General Services Administration
Federal Acquisition Service
Assisted Acquisition Services Division
Southeast Sunbelt Region

Task Order Number: ID04170096	**GSA Senior Contracting Officer:** Matthew Wright Phone: [redacted] Email: Matthew.Wright@gsa.gov **GSA Contract Specialist:** Jacqueline Milton Phone: [redacted] Email: Jacqueline.Milton@gsa.gov
November 19, 2020	
Client Organization: Centers for Disease Control and Prevention (CDC) CDC-INFO and Print Services Branch 1600 Clifton Road, NE Building 19 Room 113 MS G21 Atlanta, GA 30329	**Primary Contracting Officer's Representative (COR):** Brad Myers, M.P.H. Director, Division of Communication Services Office of the Associate Director of Communication Centers for Disease Control and Prevention 1600 Clifton Road, N.E., MS-G 21 Atlanta, GA 30333 Phone: 404-639-0526 and Cell: [redacted] email: BMyers@cdc.gov **Alternate Contracting Officer's Representative (COR):** Nancy Lindsey, IT Business Specialist (Acquisition) Centers for Disease Control and Prevention Office of the Associate Director for Communication, Division of Communications Phone Number: [redacted] Email: nel0@cdc.gov **Technical Assistant:** Rachel Ciccarone, MPH, CDC-INFO and Print Services Branch co-chief 1600 Clifton Road, MS H19-B Atlanta, GA 30329 O: 404-639-3745 C:[redacted] Email: rjl2@cdc.gov

Project Name: CDC-INFO Contact Center Services	**Period of Performance dates** Base Year- 12/01/2017 - 08/31/2018 (9 Months) Option Year 1 - 09/01/2018 - 08/31/2019 Option Year 2 - 09/01/2019 - 08/31/2020 **Option Year 3 - 09/01/2020 - 08/31/2021** Option Year 4 - 09/01/2021 - 08/31/2022 Option Year 5 - 09/01/2022 – 11/30/2022 (3 months) 6 month ext. - 12/01/2022 – 05/31/2023
CONTRACT TYPE: Firm Fixed Price/ Time and Material **Performance Based**	**Funding:** Severable Incrementally Funded
Vehicle Type: USA Contact	**Competition: Competitive**

MODIFICATIONS LOG: all changes are highlighted in yellow.

11/23/2020 – Mod 016	The purposes of Modification 016 are to: * increase the award ceilings for Option II, and CLINs 2003 and 2004, * increase the award ceilings for Option III, and CLINs 3003 and 3004, (please see note on page 36) * increase the award ceilings for the total task order, * to obligate funding for Option II, and * to obligate funding for Option III
08/04/2020 – Mod 015	The purpose(s) of Modification 015: Exercise and fully fund Option Year Three (3) for the period of Option Year 3 - 09/01/2020 - 08/31/2021. As a reminder, funding is at CLIN level.
07/14/2020 – Mod 014	The purpose(s) of Modification 014: 1. To add funding to: CLIN 2003 – Option Line Items (T&M), and CLIN 2004 – CAF (FFP). 2. To increase the Awarded Ceilings for CLIN 2003 – Option Line Items (T&M), CLIN 2004 – Contract Award Fee (Cost Reimbursable), and the Total Contract Award Ceiling.

04/30/2020 – Mod 013	The purposes of (Bi-lateral) modification 013 are to: 1. Add funding for COVID-19 2. Increase Award and Funding Ceilings 3. State that Labor Skill mix for Surge is to be coordinated between CDC-INFO and Maximus Federal. 4.a. Incorporate labor rates for SURGE procedures (PWS Task 6.1.a). The rates are IAW the rates included in the basic contract 4.b. Incorporate pricing for Software Licenses and Headset equipment for Surge 5. To incorporate Enhancements – upgrade Microsoft Dynamics 365 Client 6. Section 19 - Add Clause FAR 52.232-22 Limitation of Funds 7. To revise/correct/clarify language at: Section 7.0, Task 6.1.a.i, and Sections 8.0, 9.0, and 10.0. 8. ODCs shall be approved by CDC-INFO and invoiced in accordance with the terms of the task order. 9. Maximus Federal Services, Inc shall only invoice for the actual hours incurred.
03/26/2020 – Mod 012	The purpose of Modification 012 is to recognize the duly signed and executed Novation Agreement entered into with the United States of America (Government), General Dynamics Information Technology, Inc. (Transferor) and MAXIMUS Federal Services, Inc. (Transferee) with an effective date of November 16, 2018. In accordance with the agreement, the Transferor transfers to the Transferee all assets and the Transferee has assumed all obligations and liabilities of the Transferor for this contract and all subsequent task orders. 1. In accordance with FAR Part 42.12, this task order Modification 012 incorporates the terms and conditions of the requested Novation Agreement. As such, task order ID04170096 and respective modifications issued under this task order will be amended by substituting the name, General Dynamics Information Technology, Inc. (GDIT) to MAXIMUS Federal Services.
11/04/2019 – Mod 011	Bilateral Mod 011 to add FAR Clause 52.204-25 Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment
09/20/2019 – Mod 010	The purpose of this modification 010:

	1. Task 24 Add a full time key personnel position of Quality Assurance Manager 2. Clarify / enhance PWS requirements regarding training program and CRM search processes 3. Update WDs to the current versions: WD 15-5151 Rev 11 – MS WD 15-5469 Rev 10 – AZ 4. Update Section 6 – Performance Metrics Summary 5. Update Appendix A Emergency Report Data Definitions 6. See additional changes highlighted in YELLOW 7. As a reminder, funding is at CLIN level 8. Pricing amounts throughout PWS have been updated. 9.Increase the total contract value
08/23/2019 – Mod 009	The purpose of this modification 009 is issued to exercise Option Year Two (2) As a reminder, funding is at CLIN level
05/02/2019 – Mod 008	The purpose of this modification 008 is issued to fully fund Option Year One (1) As a reminder, funding is at CLIN level
03/21/2019 – Mod 007	The purpose of this no-cost-to-either-party modification 007 is to: 1) Realign funds From: CLIN 1003 To: CLIN 1001 for the Option Year One (1) in the amount of $550,000 in order to meet anticipated and upcoming charges. The breakout amounts are as follows: a. CLIN 1001 - Increase $550,000 b. CLIN 1003 - Decrease by $550,000 2) update the COR information and add technical assistant name; All other terms and conditions remain unchanged.
09/19/2018 – Mod 006	The purpose of this modification 06 is issued to incrementally fund this Option Year One (1).
09/12/2018 – Mod 005	The purpose of this modification 05 is issued to incrementally fund this Option Year One (1).
08/28/2018 – Mod 004	The purpose of this modification 04 is issued to Exercise Option Year One (1) and incrementally fund this task order.
08/27/2018 – Mod 003	The purpose of this modification 003 is to: 1. Correct CLIN 001 – Ceiling Price 2. Correct CAF 3. Correct Contract Award Ceiling 4. Revise Period of Performance dates 5. Incorporate Pricing based of new Period of Performance 6. Fully fund Base Year

	7. Incorporate Wage Determinations: WD15-4471 (Rev 6) and WD15-4983 (Rev 6) 8. Incorporate revised Performance Work Statement (PWS), dated August 24, 2018 and 9. Price revisions are based on General Dynamics Information Technology (GDIT) quote, dated July 27, 2018
04/05/2018- Mod 002	The purpose of this no-cost-to-either-party modification 002 is to: Realign funds between CLINS 001, 002, and 003 for the Base Year only in the amount of $287,680.00 due to the fact that the Transition period (CLIN 003) has taken much longer than scheduled. The breakout amounts are as follows: 1. CLIN 001 – Decrease by $287,680.00 2. CLIN 002 – Increase by $2,500.00 3. CLIN 003 – Increase by $285,180.00 All Terms and Conditions remain unchanged, except as specified below. This task order modification is issued in accordance with the revised Performance Work Statement (PWS), dated April 05, 2018 and the General Dynamics Information Technology (GDIT) Limitation of Cost Notification, dated March 22, 2018. The Base Ceiling Amount and Base Funded Amount are not changed.
12/20/2017 – Mod 001	The purposes Mod 01 of this no-cost-to-either-party modification are to: 1.Change the end of the period of the Transition Period (PWS - Section 11, Tasks 16, and 25 as follows: FROM: 8 weeks from Date of Award (ending January 26, 2018) TO: 10 weeks from Date of Award (ending February 9, 2018) 2. Change the Contract Line Item Number (CLIN) structure for the Basic Year only. Four subCLINs are removed from CLIN 001, and CLIN 005 is created to include these subCLINs. This change is for administrative purposes only (to allow CDC to pay for fixed priced items consistent with the timelines required). See Attachment *#ID04170096Mod-01spreadsheet* for details of "FROM" and "TO". 3. Change the invoicing of CLIN 0001 (only) as follows:

	FROM: 1/12 per month of the total amount TO: 1/10 per month of the total amount See PWS Section 21.6. 3. A. Invoices for work payable under line item 0005 shall be paid monthly, at 1/12 of the total line item value. See PWS Section 21.6. 4. Add to Section 12 - Deliverable - PWS Section Task 18A Refreshment Technology/Technology Enhancements.

1. INTRODUCTION

MISSION

The Centers for Disease Control and Prevention (CDC), located in Atlanta, Georgia, USA, is an agency of the Department of Health and Human Services (DHHS). The Agency for Toxic Substances and Disease Registry (ATSDR) is a sister public health agency in DHHS and further references to CDC in this statement of work include ATSDR unless specified otherwise. CDC works 24/7 to protect America from health, safety and security threats, both foreign and in the U.S. Whether diseases start at home or abroad, are chronic or acute, curable or preventable, human error or deliberate attack, CDC fights disease and supports communities and citizens to do the same.

CDC increase the health security of our nation's health protection agency, CDC saves lives and protects people from health threats. To accomplish our mission, CDC conducts critical science and provides health information that protects our nation against expensive and dangerous health threats, and responds when these arise.

CDC works with states, local public health agencies, and partners throughout the nation and the world to accomplish this mission. The dissemination of health and safety information plays a critical role in CDC's efforts to prevent and control diseases, injuries and disabilities. Direct customer interaction is an important and visible part of the agency's effort to carry out its mission. Health communication is a distinct focus area with a critical need to communicate to audiences in preferred formats, channels and contexts. More information about CDC is located at www.cdc.gov.

The CDC's National Contact Center (CDC-INFO) is an important component of the agency's communication infrastructure and supports CDC's efforts in numerous ways. CDC-INFO:

- serves as the voice of the CDC to inform the public, public health partners, and clinicians of CDC's science communications and programmatic activities;
- provides communication support to the general public, healthcare providers, other federal partners and internally to our emergency operation center during emergency events; and
- impacts health behavior by providing accurate and credible CDC health and safety information.

CDC-INFO serves the public via multiple access channels and builds on the award-winning service of the past 12 years of operation by providing high quality responses that meet customers' health information needs. The Contact Center uses innovative technologies and strategies to maintain its leadership as a reliable source of public health information.

CDC-INFO is a component of CDC's Office of the Associate Director for Communication, Division of Communication Services (DCS). DCS is responsible for executing CDC's communication strategy through the release of audio and video messaging and through the application of graphic design, photography and translation expertise to communicate upward and outward to customers, partners, and other stakeholders. As a program within DCS, CDC-INFO serves a critical role in communicating CDC's health and safety information to the public.

2. BACKGROUND

The CDC-INFO contact center operates under a scope of work address the need for services for the contact center to include agent support, technology to process inquiries, quality assurance, and operations.

Channels:

- Toll-free numbers (English and Spanish):
  - 800-CDC-INFO (800-232-4636)
  - 888-232-6348 teletypewriter/Teletypewriting Device (TTY/TTD)
- Email (English and Spanish)
- Postal mail (English and Spanish)
- Additional technologies and/or channels to be determined (TBD) by the Government
- Including Chat (English and Spanish) to be priced as optional
- Including Text (English and Spanish) to be priced as optional

Hours of Operation: (*see Emergency Response section for extended hour's requirement)
8:00 am – 8:00 pm Eastern Standard Time Monday through Friday

The contact center shall be closed on these federally observed holidays:

- New Year's Day
- Martin Luther King Day
- President Day
- Memorial Day
- Independence Day
- Labor Day
- Columbus Day
- Veteran's Day
- Thanksgiving Day
- Christmas Day

During overnight hours, weekends and holidays the contact center shall run a recorded message that the center is closed. The message shall include:

- the operating hours of the contact center and a welcoming message asking callers to call back to CDC-INFO during working hours
- the web address of the CDC website and CDC-INFO email form
- Information for the caller experiencing a life-threatening emergency - they should hang up and call 911.

CDC-INFO responds to inquiries on more than 750 CDC health and safety topics, with new topics and subtopic content being added to and archived continuously. Over the life of the current contract, CDC-INFO has developed a library of 7,574 telephone and email scripts; of those, 4359 are currently active and 3,315 are archived.

Audiences: General public, public health partners, medical and healthcare providers and occupational safety health specialists seeking CDC health and safety information. English and Spanish speakers and potentially other languages.

Technologies:
The contractor shall provide technologies for use in this task order that comply with the Federal Security Management Act of 2002 and be fully compliant with all CDC computer

system security policies. The contractor shall provide a Customer Relationship Management System (CRM) to document specified details of the interaction, ability to record, transmit when requested and store for up to two (2) years, all incoming phone calls, and a knowledge management system to house the scripts. In addition, to the suite of contact center technologies currently in use by the contractor, Genesys hosted intelligent call routing (HICR) and the interactive voice response (IVR) system are currently utilized and will be provided by Verizon (VZ) as part of this task order and shall be utilized in daily steady state operations and during emergency surge as determined by the Government.

Emergency Response:
CDC-INFO is an important component of CDC's emergency response communication infrastructure. In the past, CDC-INFO has provided support for a variety of outbreaks and emergency responses situations including Ebola, ZIKA Virus and a variety of foodborne outbreaks. The contractor shall be flexible in responding to future emergencies.

Exception to regular business hours – In the event CDC Emergency Operating Center (EOC) declares a public health event or emergency and/or the Joint Information Center (JIC) is activated, CDC-INFO may be expected to operate up to 24 hours a day / 7 days a week for the period identified by the Government. The contractor shall have the capability to ramp up and maintain capacity during this period to cover the extended hours and spikes in inquiry volume.

Inquiry Data and Trends:
On an annual basis, CDC-INFO handles approximately 221,077 telephone calls, 44,786 emails and 552 pieces of postal mail, and TTY/TDD telephone calls. This does not include extra volume that may occur during a public health event or emergency. The proportion of utilization of these channels is evolving and CDC expects further volatility in the future. See Section 24 - Channel of Communications.

Customer Satisfaction Assessment:
CDC-INFO's approved OMB package (OMB control number 0920-1050), entitled "Generic Clearance for the collection of Qualitative Feedback on Agency Service Delivery" National Contact Center (CDC-INFO), OADC expires June 30, 2019 serves as the framework for assessing customer satisfaction for the purposes of this task order. CDC will secure the approval for the survey, but CDC may require the contractor to administer, collect, store, and send raw data to us for the email portion of the survey, Verizon will provide the IVR survey for callers.

3. SCOPE

The contractor shall provide high quality, accurate and timely information in a courteous way to inquiries received through multiple channels. This requirement is for CDC customers within the United States, although some traffic from expatriate residents and those vacationing abroad may occur as well during defined times and days as expressed (see Functional Requirements). Additional information services for CDC or other government entities may be required over the course of the task order and may be required through the exercise of one or more line items identified as an option in the task order schedule.

4. Performance Requirement

This Performance Work Statement (PWS) allows for specificity and some flexibility in the contact center approach, while incorporating tasks and SUBCLINs, with the overarching goal of maximizing efficiency and effectiveness of contact center services while maintaining superior quality and customer satisfaction through application of industry best practices. Contact center staff responding to inquiries are Customer Service Representatives (CSRs) or agents throughout and will be identified as (CSRs) going forward in this PWS.

Additional objectives include:

- Deliver accurate and credible CDC health and safety information across CDC-INFO channels (telephone, email, postal mail and chat or text (when ordered) to multiple audiences.
- Customer Services Representatives (CSR) shall provide high quality interactions with the public and high levels of customer satisfaction in quality and utility of information and user experience based on prepared responses and other approved resources provided by CDC.
- Collect CDC-INFO data to inform CDC communication and programmatic planning.

5. GOVERNMENT FURNISHED ASSETS

The Contractor is responsible for all staff, equipment, software, management, and services to fulfill the requirements of this task order except for the assets that will be Government furnished as follows:

- CDC approved health and safety information content used for prepared responses. These include CDC scripts, fact sheets, CDC.Gov website and web pages, publications, etc.
- Other tools related to process such as templates for email, specific inquiry handling instructions based on topic, etc.

6. PERFORMANCE METRICS SUMMARY

The major performance metrics for this task order are listed below and additional performance requirements are found throughout the PWS. All performance metrics are weekly averages unless otherwise noted; surge events will have a to-be-determined grace period before performance metrics go into effect. Time periods during which agents are off the phone completing CDC administered training are not included in the performance metrics calculation.

- 80/120. Defined as 80% of all phone calls reaching the contact center being answered by an agent within 120 seconds.
- 99.5%. Defined as 99.5% availability of critical CDC-INFO business telecommunication and IT processes.

  Answer Rate is 95%. Defined as a percentage of phone calls reaching the contact center being answered by an agent. Calls that are abandon within 10 seconds of entering the agent queue are not counted against the answer rate calculation:

- Email turn-around: high priority one (1) business day; medium- and low-priority three (3) business days. Exceptions are for instances where an email requires escalation to CDC. CDC-INFO received between 1,000-3,700 emails per month for the past three (3) years. Approximately 75% are low priority and 25% are high priority.

- Phone escalations to CDC Subject Matter Experts: Emails to CDC SMEs sent within one business day of phone call
- Postal mail performance metric/: The maximum allowable turn-around time to respond to postal mail is three (3) business days.
- Quality Assurance Scores: 90~~%~~. Defined as CSR scores exceeding 90% ~~80%~~ for all channels.
- Overall customer satisfaction scores: 80%. Defined as 80% of respondents declaring themselves "Satisfied" and "Very Satisfied" (highest rating) with their contact center interaction.
- CDC-INFO shall maintain the option to lower service levels at their discretion.
- New Prepared Responses (PRs) will be put into effect within two (2) business days of receipt from CDC. PRs related to an Emergency response or outbreak will be put into effect within four (4) hours of receipt.

7.0 FUNCTIONAL REQUIREMENTS

Task 1 Contact Center Operations

The contractor shall operate CDC-INFO to handle health and safety inquiries on behalf of the CDC. Inquiries are received through multiple access channels in English and Spanish. These channels include telephone, email, and postal mail. Other channels (example chat or text) and/or languages may be changed or added at the direction of the Government based upon availability of new technologies or changing needs of CDC. CDC-INFO shall be staffed by Customer Service Representatives (CSRs) who are trained by the Contractor, highly skilled and competent in providing information on a wide variety of public health and occupational safety and health topics, which range in complexity and handling requirements. CSRs should range in skill sets from generalists (handling majority of basic public health questions) to specialists that have advanced degrees in the medical field and/or public health field can address complex occupational safety issues. In addition, there shall be an appropriate number of staff with specialized education and/or training that can provide detailed information on occupational health and statistics as well as complex and sensitive health issues and high-risk behaviors (substance use, sexually transmitted diseases, HIV, reproductive health, and human sexuality) that can result in lifelong or life-threatening consequences.

Task 2 Operational Environment

The Contractor shall:

a. Implement a contact center infrastructure that efficiently and effectively supports the needs of this task order.
b. Ensure the location of all sites and agents are within the continental United States (U.S.) and shall remain in the continental U.S. throughout the life of the contract.
c. Provide a plan detailing Facility Building Security and Related Safety Control Plan. Contractor shall grant full and open access to primary contact center facility/facilities to authorized CDC personnel or designated, authorized person for periodic visits.

All contractor systems shall be up and running and may not be scheduled for periodic maintenance during this time period. The contractor shall not schedule any internal system maintenance during operational hours unless otherwise specified or authorized by the COR.

The contractor shall proactively notify CDC-INFO of any developing situation that may impact operations, service to customers, or any other contractual issue. The contractor shall advise CDC-INFO, in advance whenever possible, of any indication that a potential problem may be developing. In the case of a known impending problem, the contractor shall be forthcoming with CDC-INFO to address the risks and to identify mitigation strategies.

System Requirements

The contractor shall assume responsibility for the maintenance of its internal systems (not supported by the CDC), including regularly scheduled quarterly and ad-hoc enhancements. The contractor shall document all of the effects/impact of the system changes using a change management process and take an active role in the change control process by:

- Schedule meetings
- Solicit topics
- Track recommended changes
- Provide cost analysis of the proposed changes or enhancements
- Obtain approval of change requests from CDC-INFO
- Code changes/enhancements into its internal systems
- Create a test plan for, testing, and implementing.

Task 2A Facilities Requirement

Place of Performance: All work shall be performed at Contractor facility or through “virtual” call centers if approved by the Government.

Contractor shall perform all work within the United States.

Contractor shall have an established facility to <u>receive</u> Data and Voice Telecommunications.

The contractor shall have two (2) redundant/diverse locations, the second location to serve as backup in the event an outage occurs.

Contractor facility shall support high bandwidths.
NOTE: VZ will provide Genesys Platform support and circuits shall be ordered by VZ

Task 3 Inquiry Handling

The Contractor shall:

a. Provide telephone call, email, chat, text and postal mail inquiry responses, in English and Spanish (as determined by language of inquiry) and potentially other languages identified by the Government, based on CDC approved inquiry handling procedures and other tools and resources.

b. Place orders for publications received via telephone, email, text or postal mail.
c. Provide a contact center infrastructure that allows for the handling of a broad range of CDC public health and safety topics, from simple to complex inquiries that are appropriate for the channel and the audience. The contractor shall determine the most effective setup for agent operations, which could include a tiered approach or a podding (grouping) of skill sets in order to provide the most accurate responses to all inquiries.
d. Provide appropriate skill set coverage during business hours listed under 'Hours of Operation', at a level commensurate with contact activity.
e. Provide information in a professional manner, and ensure the inquirer's' questions are answered accurately, completely, and in a satisfactory manner in accordance with approved CDC materials. CDC expects each CSR to follow established processes and procedures and not act as a CDC expert on matters they encounter.
f. Ensure ability to transfer calls both to and from generalists and specialists, and send inquiries via email to CDC subject matter experts.
g. Ensure ability of agents to return calls to inquiries:
    i. When information was inadvertently escalated when it should not have been by the contact center.
    ii. When a quality issue needs to be followed-up (e.g., corrects misinformation or fixes a mishandled call).
    iii. When the inquirer can only be reached via phone.
h. Implement procedures for handling and escalating of inquiries based on complexity of information, subject matter expert, or caller behavior. Ensure agents have access to multiple email addresses for escalating and responding to inquiries.
i. Provide TYY/TDD phone capabilities to originate and respond to hearing impaired callers (current volume ranges from 6-8 calls per month). The system is currently engaged via 800-232-6348 for direct dial calls to and from any TTY or modem is called NexTalk-VM. The assistance technology TTY/TDD calls uses an analog line.
j. Provide CDC a weekly listing of any content issues – gaps in CDC resources and problems experienced with CDC materials. Notify CDC within four (4) hour**s** of any issues with critical information via email and phone.

3.1 Telephone Contacts

The Contractor Shall:

a. Provide telephone inquiry coverage commensurate with contact activity and operating hours listed in Section 2.
b. Maintain a performance metric standard of 80/120. This means 80 percent of all calls offered to the contact center shall be answered by an agent within 120 seconds, measured across each week.

3.2 Correspondence (Email, Text, Chat and Postal Mail) Contacts

The Contractor shall:

a. Develop all written correspondence from prepared responses, cdc.gov, templates and other sources provided by CDC. CDC and the Contractor shall work in partnership to provide the necessary capability for CDC-INFO to handle all requests received via postal mail and email and distribute the responses in paper and email format.

b. Work with CDC to develop a process for email, chat and written correspondence.
c. Utilize Style Guide, and templates, and other documentation provided by CDC to facilitate consistent responses. Note: CDC-INFO existing templates will be provided upon award.
d. Provide CDC with a copy of all written correspondence as the response is sent to the customer.

Performance metric for email messages: The maximum allowable turn-around time to respond:

High-priority emails (defined by CDC) are one (1) business day. The maximum allowable turn-around time for medium- and low- priority emails (defined by CDC) response to items of correspondence is three (3) business days.

Performance metric for postal mail: The maximum allowable turn-around time to respond to postal mail is three (3) business days after the contractor has received the inquiry. The same priority levels that have been established for email apply to postal mail (high, medium, and low depending on topic and audience).

Task 4 Policies and Procedures

The CDC must approve all policies and procedures before implementation.

The Contractor shall:

a. Develop and maintain policies and standard operating procedures for professional behavior rules for CSRs and all contact center personnel concerning CDC-INFO's scope, to include but not limited to, protecting the confidentiality of personal information and not providing health consultations, medical or diagnostic advice or opinions.
b. Develop and maintain policies and standard operating procedures for inquiry handling procedures, to include, but not limited to:
   - Law enforcement coordination policy for reporting calls regarding physical abuse, maltreatment of children, assault, threats or suicidal intent. Specific instructions shall be provided upon award.
   - Scaling staffing up and down to address surge requirements will be listed under this topic.
   - Recording and implementation of automated scripts to be used for hold times, and when the call center is closed which shall include information on resources at www.cdc.gov, and 911 / law enforcement calls or to leave a message.

Task 5 Surge/Event Response Inquiry Handling

The Contractor shall:

a. Respond to inquiries that exceed normal steady state levels that may be caused by seasonal trends, emergency response situations, or other public health events.
b. Establish procedures to handle surges in contact volume that exceed normal steady state levels. For example, during Ebola 2014-15 and currently Zika Virus, contact

inquiry was higher than normal for several months. The contractor shall have a plan in place that utilizes existing CDC infrastructure (Genesys/IVR), to handle such events.

c. Develop, update and maintain a Surge and Scalability Plan for approval by the Government that defines how the contractor will ensure readiness and response. Update the plan on, at least, an annual basis.

This CLIN (Surge/Event Response) is currently funded.

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Task 6 Staffing Management

The contractor's staffing management strategies for the proposed contact center model should be based on, but not limited to, contractual performance objectives, hours of operations, channel, breadth and depth of CDC-INFO topics, geographic coverage, CSR skill sets, audience language requirements, and inquiry volume. The staffing management strategies should be the appropriate scope, size, and requirements to meet the needs of the CDC-INFO contact center and the requirements of this task order.

The Contractor shall:

a. Hire, train and retain qualified CSRs to carry out the information services specified herein. Consideration should be given to staff having an understanding of public health and public health issues as well as some staff having a health professional background (e.g. nurse, physician assistant, or physician) to handle particularly complex calls. In particular, CSR's should include an appropriate number of staff with specialized education and/or training that can provide detailed information and counsel on occupational health, statistics as well as complex and sensitive health issues and high-risk behaviors (substance use, sexually transmitted diseases, HIV, reproductive health, and human sexuality) that can result in lifelong or life-threatening consequences.
b. Provide CSRs that have good interpersonal skills and telephone etiquette.
c. Develop forecasting models by analyzing historical data to identify volumes, call patterns and predictable cycles to ensure optimal staffing and meet specified contractual performance requirements.
d. Develop methodology to include call handling time and after call wrap-up.
e. Develop and maintain procedures for clearance and screening employees to ensure all staff shall:
    i. Not identify with any private organization affiliation that would affect their performance of the work.
    ii. Avoid any use of this position to advance their own viewpoints or that of any group or organization with which they may be affiliated or sympathetic.
    iii. Ensure the privacy and sensitivity of any personal information.
    iv. Provide a Staffing Management Plan, updated on an annual basis that outlines the strategies to be employed to recruit, train and retain CSRs, as well as the approach for ensuring the workforce meets the requirements of this task order. Work with CDC on review of the plan.
    v. Not place limits on call handle time for agents to ensure quality and accuracy

of response.

vi. Meet with recruitment office/team to discuss skills needed and most appropriate applicant pool, and recruitment strategies,

6.1 Surge/Event State Workforce Management

The Contractor shall:

a. Provide surge/event state staffing to meet the volume of inquiries by:

i. Offering overtime (to include nights, weekends, and/or holidays) as an extension of normal working hours or split shift; overtime must be approved by the Government, with an executed contract modification,

ii. Develop collaborative relationships and agreements with other contractors/organizations to use as applicable.

iii. Deploy all trained operations staff to handle all inquiries.

b. Surge staffing should start to be in place within 24 hours of notice from the government, with a full staff-up occurring in 72 hours (depending on need).

c. Ramp-down of surge staffing based on direction by the Government, but with as little as 48 hours' notice.

Task 7 Internal Quality Assurance and Customer Satisfaction Framework

The contractor shall develop and manage a Quality Assurance (QA) Plan to ensure achievement of the contract's quality and customer satisfaction objectives. The contractor shall provide a comprehensive plan that outlines a continuous improvement program. The framework should utilize industry best practices to ensure conformance to established performance standards and to assist CDC-INFO management in key decision-making efforts. The plan shall be updated as necessary or as instructed by the Government to ensure that it remains current. The Government shall retain all data and data collection tools, and reports for all evaluation/assessment initiatives.

The contractor shall:

a. Conduct monitoring evaluations, for example, scoring phone and email inquiries (selected at random of various lengths, on various topics across all times and topics) utilizing CDC provided scorecards at least three (**3**) times per week per agent:
b. Provide coaching sessions at least once per week per agent.
c. Provide additional coaching sessions as needed to address quality concerns.
d. Pinpoint coachable events for improvement; determine training needs on an individual or group basis; action plans for improvement or remedy; and, assess consistency in customer experience. When poor quality is identified, coaching will be provided as well as training when needed.
e. Utilize the CDC provided scorecard and rubric for quality monitoring of calls and emails and other channels.
f. Meet bi-weekly with CDC to calibrate quality scoring and ensuring consistent and objective quality monitoring.
g. Provide a Monthly Quality Report (no more than 25 pages) and no more than two (2) of those pages provide actions taken to correct problems identified by CDC programs. This report should be delivered no later than the 10th of each month.
h. Provide the Government on-demand access to call data and performance information

(e.g. customer satisfaction)

i. Ensure agents are fully documenting all relevant information from inquiry processing.
j. Conduct verbally, start of shift meetings with agents to ensure key information is shared (e.g., operational changes and updates, quality concerns, new or updated information from CDC, etc.).
k. Notify CDC proactively when there are QA deficiencies or issues identified.
l. Provide a breakdown of quality for agents and topics to see how all tiers of agents are performing and identify more opportunities for QA improvements.
m. Work with CDC to address escalation routing variances.
n. When agent calls are, "red flagged" or "yellow flagged" per CDC rubric, ensure there are increased monitoring and follow-up, coaching, and training.

7.1 Call Monitoring

The Contractor shall:

a. Implement an Internal Call Monitoring Evaluation Strategy/Plan that specifies criteria for call monitoring activities, e.g. percentage of number of calls within a specified time period or selected at random and ensure all CDC programs are evaluated.
b. Record 100% of all calls for the entire length of each conversation and maintain a historical database containing recorded calls for a two (2) year period, in accordance with National Archives and Records Administration (NARA).
c. Independently evaluate call interactions in order to identify call handling proficiencies/discrepancies, addresses the general style of the agent interactions, identify opportunities for improvement, assess consistency in callers' experience and determine necessary actions.
d. Record all results in a QA system and provide a QA Report of results to CDC on a monthly basis.
e. Provide call recordings daily via secure FTP to CDC-INFO so that CDC programs may listen to actual current calls about their topics.
f. Pull calls as requested by CDC.

Task 8 Surge/Event State: Quality Assurance, Customer Satisfaction and Training

The contractor shall:

a. Develop a surge plan to accommodate a rise in (all channel) volume due to a public health outbreak or event.
b. Work in coordination with CDC-INFO to develop and update annually a Surge and Scalability Plan that detail how quality assurance and customer satisfaction assessment will be conducted during a surge or emergency response event.
c. Train existing staff for at least four (4) hours on new content related to the event and any new SOPs related to emergency events.
d. Either the contractor and/or CDC will provide training to any new staff brought on as the result of a surge (depending on the situation). New staff brought on as a result of the surge will receive four (4) hours of training on CDC resources as defined by CDC specific to the response. As well as weekly opportunities for additional training in quality and inquiry handling.
e. Any new staff brought on as the result of a surge must be monitored for quality more frequently than existing staff. **A minimum of one (1) inquiry per agent shift day**

shall be implemented for any new surge agent staff throughout the duration of the surge.

f. Prepared Responses and resources related to Emergency Response or outbreaks will be put into effect within four (4) hours of receipt. Materials will be **archived within four (4) hours** of CDC request.

Task 9 Employee Training and Development

All training materials developed under this task order are the property of CDC and the Government. The Contractor shall provide electronic versions upon request. At the end of this task order all training materials developed in support of this task order shall be turned over to CDC in its entirety. The specified format will be determined by the Government.

The requirements in Task 9 apply only to steady-state operations; Surge Training Requirements are specified in Task 8.

The contractor shall:

a) Provide a Training Plan to implement a comprehensive employee training and development program to support quality assurance, customer satisfaction, and agent performance for phone, email, and postal mail channels. The plan shall be based upon **sound** adult learning educational principles and outline a variety of teaching methodologies appropriate to meet employee training and development objectives that lead to increases in quality, customer satisfaction, and agent performance.
b) Provide a training environment suitable for adult professionals, including those Americans with Disabilities (ADA compliant), to accommodate the specific space, seats, and equipment needs of the curriculum and support a variety of instructional methodologies to achieve task order objectives. Ensure training facilities at sites with more than 10 FTE meet industry standards such as having a projector screen and independent light switches, along with computers systems and software that is identical to those in use on the call center floor. If virtual training is used, telecommunications technology must allow students to fully interact with all instructors, ask questions, see instructors and/or presentations, and be seen by instructors. For all new hire trainings (class size larger than five (5), a trainer should be present and onsite (i.e., in-person) to conduct the training.
c) Work together with CDC to develop and provide training to CSR in conjunction with contractor training to address issues that may arise.
d) Provide editable word documents or other editable files to CDC of all materials scripts and agendas for all trainings given to receive review and approval, 30 days prior to implementation
e) Record any training given by CDC staff (both audio and video) in a high quality format for use in future agent training. Provide a copy of these recordings to CDC staff upon request. Ensure these videos are available to staff who do not receive the training.
f) Provide to CDC a listing/catalog of materials used for training with a naming convention that is consistently matched and used across all

materials. The document should contain a date for when it was last updated, and new items are to be added to the list once developed, approved by CDC, and old items no longer used, listed as archived.

g) Verify Agents are provided with access to online training system (CDC Train) and it is capable of running on their system.

h) Provide monthly training report, organized by individual and training topic including the total number of training hours completed. This report will include the agent name, agent alias, agent type, title of each training, the type of training, and will reflect the accurate name of any CDC provided training. Actual dates will be included for training completion, not the date the training was scheduled.

i) Provide ongoing continuing education opportunities for agents, including topics on empathy, professionalism, customer service, call flow adherence, not offering personal opinions, etc.

j) Provide a listing of the continuing education opportunities provided by the Training Manager to agents.

k) Forward training materials, including but not limited to training newsletters, job aids, and follow up materials, to agents within three (3) business days. Ensure that agents are given time to read and understand these materials.

l) Ensure agents have access to Content and Operations materials and updates, including but not limited to SOPs, Hot Topics, Info to Know, and announcements. Provide agents with a reasonable amount of time to review and understand these materials.

m) Provide a method such as an anonymous survey or a form similar to the Agent Feedback Form for content issues that allows agents to communicate training needs and provide anonymous feedback related to training to CDC.

n) Conduct a follow-up with all new hires, no later than one month from the nesting period, to see what was most helpful during new hire training and where agents find they still need learning or assistance. All new hires should complete priority one (1) training within two (2) months of work beginning.

o) When agents undergo nesting, a nesting review period shall be incorporated for agents to discuss their nesting experience and ask questions.

p) CDC shall have the ability to conduct two (2) one-hour training sessions per month on the topics of their choosing. CDC-led training sessions can include in-person, virtual, or self-study modules. CDC-led training will be scheduled with the CDC-INFO workforce team based on the days and times that cause minimal disruption to the contact center. Days during which CDC-INFO agents are off the phone for CDC administered training are not counted in the Phone performance requirements defined in Section 6 of this PWS.

q) Self-study modules should be administered as directed by CDC to include pre-tests before any materials are given; agents are given ample time to review reading materials and complete self-study questions. Small group discussions are held to hear and discuss agent’s experience. Post-test is administered last after all other materials are completed. In the event the

CDC program does not provide a pre- and post- test, these steps are not necessary.

r) Upon CDC request, printed materials (i.e. new hire training materials, job aides) will be provided to agents when necessary to facilitate learning and/or perform job duties. The use of printed materials shall be versioned controlled and in compliance with paperless environment policies.

Telecommunications and Information Technology Infrastructure

Task 10 Network Architecture - The Contractor shall:

a. Provide an infrastructure to support proposed contact center operations that meet Government security regulations/guidelines (see Task 19), engineered as a scalable environment to meet surge demands, and meets the performance requirements of this task order.
b. Provide an architecture that supports the hosted Verizon Hosted Intelligent Call Routing (HICR) and virtual Automatic Call Distributor (ACD) for routing of calls. (NOTE: CDC is providing via the Secure File Transfer (sFTP)
c. Provide all necessary licensing for systems (other than Genesys).

10.1 Connectivity

The Contractor shall:

a. Include in their Continuity of Operation Plan (COOP) at a minimum: description and diagram of the voice and data connectivity to support proposed operations including steady and event state operations, parallel operations, contingency strategies and failover plan for outage protection for hosted data center or premise site, and inbound capabilities with designed redundancy for primary/premise site (front and back entry phone lines) from local carrier/provider.
b. Utilize CDC-INFO existing Verizon connectivity, servers and circuits to accommodate:

    HICR, voice and data transport

    The components of the Genesys (HICR) system: Solution Control Interface (SCI), Interaction Routing Designer (IRD), CME, CC Pulse and Verizon Enhanced Reporting

    Existing hosted IVR structure during steady and event state

    Remote agents, if applicable

    Circuits for routing calls to the primary site, remote site(s) and any site for emergency events

    All desktop and telephony components including supporting systems WorkForce Management (WFM), Quality Management (QM), and any other systems that enhance/add value to the overall operations and efficiencies of the contact center

    TTY/TDD services for the hearing impaired

    Monitor and visually display call-handling statistics and availability status real time from both onsite and remote locations.

Task 11 Intelligent Call Routing

Steady State Routing

The Contractor shall:

a) Utilize existing CDC-INFO Verizon HICR and IVR platforms in the telecommunication design and support routing schemas based on several criteria, including: IVR driven (menu selection and caller supplied data), Automatic Number Identification (ANI) and ANI blocking, Dial Number Information Systems (DNIS), and other planned routing strategies for steady and event state. Call routing shall support prerecorded Verizon wait treatments messages for hold and information updates.

b) Replicate routing strategies and hold messaging application within the Contractor's telephony architecture (ACD) independent of HICR for contingency purposes in case of HICR failure.

c) Test all strategies and applications in a test environment prior to deployment.

d) Provide a Time and Material (T&M) resource with Verizon HICR and Genesys expertise to serve as liaison between CDC, Verizon and the CDC-INFO team.

11.1 Event/Surge State Routing Strategies

The Contractor shall:

a. Ensure that the event/surge routing strategies are consistent with the approach outlined in the Surge and Scalability Plan.

Task 12 Computer Telephony Integration (CTI)

The Contractor system shall:

a. Provide the ability to activate emergency alarm to capture phone number in the event of crisis or personal threat (suicide) of caller or threatening call. Integrate and coordinate with emergency, medical, social service, or law enforcement agencies.

Task 13 Interactive Voice Response (IVR)

Note: CDC-INFO Steady State and Surge/Event IVR services shall be provided by the contractor throughout the life of the task order. Note: Event State is activated by CDC for emergencies. The guidance for the contractor is stated in the PWS.

13.1 Steady State IVR

The Contractor shall:

a. Integrate with existing Verizon hosted IVR application and the following capabilities:

   i. Routing schemes based on skill set, audience segmentation, language
   ii. Integration with CTI for screen population of call data
   iii. Whisper—audible announcement that identify the call type to the agents, so they are pre-warned about the issues they will encounter
   iv. Hidden menus for emergency response, hidden messaging logic capability
   v. Messaging application for wait treatments and information updates
   vi. Support Voice User Interface (VUI) (speech recognition) and Dual Tone Multi-Frequency (DTMF) (touch tone) to select options from menu
   vii. Provide daily HICR Customer Call Records (CCR) file for IVR reporting (NOTE: Verizon provides CCR file to CDC)

viii. Ability to accept CCR data from Verizon (VZ) FTP site
ix. Allow multiple entry points; accepts multiple access numbers
x. Optimize call routing capabilities that support IVR selections for both steady and event state
xi. Verizon provides CCR file to CDC
xii. Agents shall have the ability to initiate a 3-way call between the caller, themselves, and an external language interpretation service to assist with inquiries in languages other than English and Spanish. This includes the ability to place the caller on hold while initiating the out dial to the language interpretation service, and connecting all three (3) parties for the duration of the call.
xiii. Three ways call shall be recorded the same as all other calls.
xiv. Verizon maintains the IVR and all changes

Information Technology Infrastructure

13.2 Customer Relationship Management System (s) (CRM)

The Contractor shall:

a. Ensure that selected CRM allows for efficiency and effectiveness of contact center operations and adheres to best practices in contact center operations.
b. Engage with CDC-INFO early in the CRM development process to ensure that the data modules that are implemented will address our major processes and concerns, as outlined in this requirement, to ensure that we will have high quality and complete sets of data.
c. Create a new record automatically as soon as a call is received and connect this record to CCR data and the call recording using a universal identifier.
d. Import callers' metadata and all menu options they selected from CCR menu and display the information to agents.
e. Parse and save the information received from the CCR menu, including the
f. Universal identifier, in corresponding fields within the CRM automatically.
g. Allow agents to put a record in a pending status to warm transfer from generalist to specialist, from agents to the EOC or a CDC hotline, or for escalations to ensure all actions taken to resolve an inquiry are captured within the same record.
h. Ensure CRM is flexible enough to allow for fields in CRM and dropdown menus to be changed.
i. Enable agents to capture callers' geo location with automatic verification when a street address is provided.
j. Create new records automatically for inquiries submitted via the CDC-INFO Web locate form or email and assign a universal identifier for each record to connect all information related to the record across all systems and processes, including escalations.
k. Allow agents to reopen a record and make changes if new actions are taken after it has been closed.
l. Enable real-time spell check on all data fields and emails.
m. Include data fields for handling inquirers' Personally Identifiable Information

(PII) such as name, phone number, and address. Agents shall be trained to ensure PII provided by inquirers on calls, the CDC-INFO Web form, emails, and postal mails are correctly entered into the corresponding fields. These fields should be easy to include or remove from various reports to reduce risks associated with handling PII.

n. Allow agents to log multiple dispositions, or outcomes, if more than one processes or resources were used to resolve an inquiry.
o. Accommodate customized CRM data fields based on defined CDC requirements to enable a systematized and uniformed contact center management operations that collect inquiry data and relevant information.
p. Ensure agent desktops have internet access.

13.3 Surge/Event State IVR

The Contractor shall:

a. Integrate with existing Verizon hosted surge/event state IVR. (NOTE: Verizon will provide)

13.4 Search Utility

The Contractor shall provide advanced search capabilities ~~which~~ that contain a combination of static and variable information (such as keywords or phrases) in fields that ~~to~~ allow the agent to control their flow through the ~~inquiry~~ prepared response (PR) and through the repository of PRs and other CDC Resources/tools and easily access PRs/scripts, A-Z list, address book, and other tools provided by CDC. The CSR should be able to locate the appropriate PR within 60 seconds on average through search ~~and/~~or navigation and once the appropriate content is located, the content should be displayed on the CSR's screen in <5 seconds on average after being located.

Task 14 User Interfaces

The Contractor shall:

a) Provide customizable user interfaces based on the functional requirements and allow secured access to persons other than the Contractor authorized by CDC-INFO Project Officer.

Task 15 Internal Quality Monitoring and Customer Satisfaction System

The Contractor shall:

a) Provide a system to support data collection for internal quality monitoring and customer satisfaction analyses, manage and store data, perform complex data analysis, and produce reports.
b) Maximus receives IVR survey data from CDC in a separate file that is not integrated.
c) Provide the Government on-demand access to call data and performance information (e.g. calls received, handled, and abandoned)

Task 16 Content Management System

The Contractor shall:

Integrate the Customer Relation Management System (CRM) with a content management system to respond to, house, and access content and CDC Resources/tools to respond to incoming inquiries. At a minimum, the integrated desktop shall have the following capabilities:

a. Ability to accept, store, and manage content (prepared responses) developed by CDC. Note: content (Prepared Responses) will be provided in Microsoft Office Word, and include formatted text.
b. Facilitate an easy and rapid importation of new PRs as needed and the deletion or archiving of PRs that are no longer active.
   i. New PRs will be put into effect within two (2) business days upon receipt from CDC.
   ii. Resources will be put into effect within one (1) business day upon receipt from CDC.
   iii. Regular Prepared Responses and Resources will archived within four (4) hours of receipt from CDC.
   iv. All urgent materials will be archived within four (4) hours of CDC request.
c. Allow for English and Spanish content; other languages may be added by the Government over the life of the task order.
d. Allow agents to search for content and instructions across all approved resources provided by CDC, including but not limited to prepared responses (PRs), A-Z List, Address Book, and other CDC Resources/tools. ~~program flows~~.
e. Include the capability for CDC to rank PRs (i.e., on a scale of 1-5 and 1-10) and CDC-approved resources to ensure that workflows are followed in the correct order and the most relevant PRs/content, such as Log Call PRs, are displayed at the top of search results.
f. Capture and save agents' navigation paths through the Knowledge Management System (KMS) for each inquiry record, and use the record's universal identifier to link this information with data captured from other systems and processes (e.g., CCR, CDC-INFO Web form, CRM, video or searches, audio recording, and escalations).
g. Enable agents to select and log resources and actions taken to resolve an inquiry as they navigate through the KSM to keep data-entry errors at or below five (5%) percent.

Note: The existing contractor uses Social Knowledge Engine to house over 7,000 (active and inactive) prepared responses (content) for all agents to use when responding to inquiries from multiple channels.

The Awardee must be capable of importing these prepared responses for upload and use into their system and have the capability to archive prepared response at request of CDC. The transition of these prepared responses (content) must be completed by 05/31/2018.

Task 17 Workforce Management System

The Contractor shall:

a. Provide a workforce management system to predict interaction volumes and patterns develop work schedules, and manage adherence to agent schedules based on inquiry volume patterns.
b. Integrate workload management tools with hosted intelligent call routing (HICR) platforms that support virtual call routing for load balancing among all sites (if the contractor has more than one site) for both operational states (Steady/Ready and Event)

Task 18 Systems Process and Procedure*s*

Systems Environment

The Contractor shall continually assess systems and procedures used under the task order and make recommendations for changes / modifications to improve efficiency/ effectiveness and/or cost. More specifically:

The Contractor shall:

a) Provide software that is current, defined as no older than two releases back from the latest commercially released software version and which is currently supported by the software contractor.

Change Control/Data Access

The Contractor shall:

a) Define change control procedures for controlled access or modifications to systems, software applications, data files, or specific data elements by authorized persons or systems.

Task 18A Refreshment Technology/Technology Enhancements

Future Enhancement Report

The contractor shall provide an **Annual Future Enhancement Report** that covers any recommended changes or improvements. The contractor shall submit its recommendations for future enhancements to the COR, by the last business day of the seventh (7) month after the effective date of the task order. At a minimum, the report shall include complete, objective answers to the following questions:

• What is the cost of making the recommended changes?
• What are the benefits to be derived from making the changes?
• What is a reasonable time frame for completing the enhancements?
• How will outcome(s) be measured?

The contractor shall evaluate frequently asked questions it receives to identify opportunities to improve identification and recovery processes. The contractor shall also address ways to improve its internal customer support services. If a contract option year is exercised, the contractor shall submit the Future Enhancement Report by the seventh month after the effective date of the exercise of the option. CDC-INFO will respond to the recommendations within 30 business days of receipt of the report.

Task 19 Systems Security/Privacy

System Security Management

The Contractor's systems shall:
Comply with Federal Information Security Modernization Act of 2014 and be fully compliant with all CDC computer system security policies. The Contractor shall develop a Mitigation Plan with associated timelines for any of the standards that are not currently within acceptable standards. The Contractor shall document, update, and maintain a system/data security plan that adheres to CDC standards and includes systems security at the desktop, network, and system/subsystem level. The Contractor shall leverage any previous FISMA-compliance project lessons learned that could be applied to the CDC-INFO program

a. Participate in the Security Assessment and Authorization ("SA&A"), formerly "C&A" audit of systems for Federal Information Security Management Act (FISMA) of 2002 compliance and utilize "lessons learned" from other Government contracts.

b. The Office of Management and Budget (OMB) through Circular A-130, Management of Federal Information Resources, requires federal agencies to: plan for security; ensure that appropriate officials are assigned security responsibility; periodically review the security controls in their information systems; and authorize system processing prior to operations and, periodically, thereafter. This authorization by senior agency officials, often referred to as the Designated Approving Authorities (DAA), is sometimes referred to as accreditation. The technical and non-technical evaluation of an IT system that produces the necessary information required by the authorizing official to make a credible, risk-based decision on whether to place the system into operation is known as certification. The individual responsible for making a technical judgment of the IT system's compliance with stated security requirements, identifying, assessing, and documenting the risks associated with operating the systems, coordinating the certification activities, and consolidating the certification and accreditation documents, is referred to as the certification agent or certifier

c. Maintain at a minimum:

  i. Procedures for controlling, handling or accessing Government data and other information system resources

  ii. Security features used in association with proposed systems (both hardware and software) to include: virus protection, least privileged access, authentication, FIPS 140-2 validated encryption, intrusion detection, and incident response, continuous diagnostics and mitigation, managed firewalls, vulnerability security scans, transparent authentication to CDC systems for a more secure and auditable integration, password-based authentication, data integrity and confidentiality, transmission integrity, access control, automatic lockouts and password life spans, and FIPS 140-2 validated encryption for confidentiality and integrity of all sensitive communication

  iii. Establish physical storage procedures sufficient to protect Government data and other information system resources.

d. CDC-INFO Contact Center Services is considered Moderate Level Security.

Task 20 Continuity of Operations Plan (COOP)

The Contractor shall:

- **a.** Engineer contact center operations for high availability and minimize potential downtime to meet or exceed an availability requirement of 99.5% for critical operational services.
- b. Develop a Continuity of Operations Plan (COOP) to ensure continuity of service in the event of naturally occurring disasters, national emergency, or software, system, or equipment failure causing interruption of service.

Task 21 Data Management

The Contractor shall:

a. Provide a Data Management Plan that outlines the proposed approach to meet the data and reporting requirements of this task order.

b. Engage with CDC-INFO early in the CRM development process to ensure that the data modules being implementing will address CDC's major processes and concerns, as outlined in this requirement, to ensure that we will have high quality and complete sets of data.

c. Provide necessary interface for importation and exchange of data for systems external to the Contractor network, including Genesys the HICR solution, the steady state IVR, and any failover operation into the data warehouse structures for reporting purposes.

d. Establish a universal identifier for each inquiry that will be used to tie data collected across all systems and processes to ensure seamless integration and traceability for all information related to the inquiry. These systems and processes include but are not limited to the custom call routing (CCR) with interactive voice response (IVR) menu, knowledge management system, audio recording system, inquiries created from the CDC-INFO Web form, emails, escalations to CDC programs, interactions with CDC publication systems, and handling of non-standard inquiries such as complaints or threats.

e. Ensure all data collected and delivered to CDC are compatible and compliant with CDC's system requirements and standards, including but are not limited to

  a. Use an open standard file format compatible with CDC's data systems such as a comma-separated values (CSV) file.

  b. Conform to a data dictionary approved by CDC.

  c. Include a last modified date field corresponding to the date and time of the last activity for each data record.

Customer relationship management (CRM) solution must be able to:

  d. Create a new record automatically as soon as a call is received and connect this record to CCR data and the call recording using the universal identifier.

  e. Calls shall be recorded for the entire length of each conversation.

  f. Import callers' metadata and all menu options they selected from CCR menu and display the information to agents.

  g. Parse and save the information received from the CCR menu, including the universal identifier, in corresponding fields within the CRM automatically.

  h. Allow agents to put a record in a pending status to warm transfer from generalist to specialist, from agents to the EOC or a CDC hotline, or for escalations to ensure all actions taken to resolve an inquiry is captured within the same record.

i. Enable agents to capture callers' geo location with automatic verification when a street address is provided.
j. Create new records automatically for inquiries submitted via the CDC-INFO Web form or email and assign a universal identifier for each record to connect all information related to the record across all systems and processes, including escalations.
k. Allow agents to reopen a record and make changes if new actions are taken after it has been closed.
l. Enable real-time spell check on all data fields and emails.
m. Include data fields for handling inquirers' personally identifiable information (PII) such as name, phone number, and address. Agents will be trained to ensure PII provided by inquirers on calls, the CDC-INFO Web form, emails, and postal mails are correctly entered into the corresponding fields. These fields should be easy to include or remove from various reports to reduce risks associated with handling PII.
n. Allow agents to log multiple dispositions, or outcomes, if more than one processes or resources were used to resolve an inquiry.
o. Integrate knowledge management system (KMS) with CRM to streamline and automate operations and data capturing. At a minimum, the KMS should
    a. Allow agents to search for contents and instructions across all approved resources provided by CDC, including but not limited to prepared responses (PRs), A-Z list, address book, and program flows.
    b. Include the capability for CDC to rank PRs and CDC-approved resources to ensure that workflows are followed in the correct order and the most relevant content, such as log call PRs, are displayed at the top of search results.
    c. Capture and save agents' navigation paths through the KMS for each inquiry record, and use the record's universal identifier to link this information with data captured from other systems and processes (e.g., CCR, CDC-INFO Web form, CRM, audio recording, and escalations).
    d. Enable agents to select and log resources and actions taken to resolve an inquiry as they navigate through the KSM to keep data-entry errors at or below 5%.

21.1 Surge/ Event Data Management

The Contractor shall:

a. Provide necessary interface for importation of data from systems external to the Contractor network to be incorporated into data structures for reporting. Include at a minimum the following data systems:
  - **i.** Genesys HICR
  - **ii.** Emergency IVR

Task 22 Confidentiality/Privacy of Data and Information

The contractor shall:

a. Ensure that the confidentiality and privacy of health information is protected from loss, unauthorized use, access, or disclosure, including electronic and oral information
b. The Government retains ownership of any data that is collected in responding to inquiries and such data shall not be shared by the Contractor with other government agencies, organizations, companies, or individuals
c. The Contractor shall affirm that all data will be kept strictly confidential
d. The Contractor is expressly prohibited from releasing, publishing, or using the data collected unless the Contractor receives express written authorization from the Contracting Officer
e. Ensure that record storage and disposal practices are compliant with the stipulations of CDC's NARA package submission
f. Provide privacy procedures for protected information, how it is used within the system, and when information may be disclosed. Ensure that the contact center will use the information for clearly defined purposes, safeguard the information, and protect it from compromise
g. Adhere to the Confidentiality of Information by protecting the personal interests of individuals, corporate interests of non-governmental organizations, and the capacity of the Government to provide public services when information from or about individuals, organizations, or Federal agencies is provided to or obtained by contractors in performance of HHS contracts
h. Purge all contact/personal identifiers) information based on defined business rules
i. Ensure that customer satisfaction data is protected and consistent with the CDC-INFO approved OMB package 0920-1050.

Task 23 Reporting

This task order requires a defined set of standard reports at the enterprise (CDC-wide) and programmatic levels for all communication channels.

The contractor shall provide the following reports:

a. **Weekly Communication Report (snapshot)** that details operations metrics on telephone, email, text, chat and postal mail, top inquiry topic overall and by channel, performance metric achievement, topics exceeding normal steady state volume and other variables as requested by the government.
b. **Event/Surge State Repor**t during an emergency. Parameters for this report fluctuate and are determined at the time of the emergency.
c. Provide CDC-INFO with a **Program Management Monthly Status Report** (no more than 25 pages) which should include program highlights and issues, overall agent's' performance, including measures such as availability, call handle time, and after work time (wrap-up).
d. Access to real time data, reporting mechanisms, or dashboards that allow customized reporting on call volume, topics, and other information will be required.
e. Per Task 7: Provide a **Monthly Quality Report** (no more than 25 pages) and no more than two (2) of those pages provide actions taken to correct problems

identified by CDC programs. This report should be delivered no later than the 10th of each month.

f. Per Task 9: Provide a **Monthly Training Report**, organized by individual and training topic including the total number of training hours completed.
g. Financial Report to the COR and management that details total task order amount, funded amount, expenditures and current balance.
h. Per Task 24: Provide CDC with minutes from key meetings within 24 hours.

These reports shall be provided to CDC. A Letter of Transmittal then shall be submitted to GSA through the CDC COR for input to GSA ASSIST Portal (https://portal.fas.gsa.gov/web/guest/home. The letter of transmittal will be provided after award.

Task 24 Program Management, Organization, and Deployment

Program Management

The Contractor shall:

a. Provide CDC-INFO with a **Management Plan** that demonstrates an understanding of the requirements and comprehensively details management strategies and methodologies to meet the performance requirements of this task order.
b. Manage costs effectively, communicate cost related changes timely, and submit timely and accurate billing.
c. Provide the government with suggestions and options gleaned from advances in the contact center management field so as to assure that "best in practice" options are explored and as determined by the Government, implemented.

The Management Plan shall include:

a. The management structure of the Program Management Team, organizational charts identifying operations management, and project teams/team leads for the planning and implementation of system during start up, transition, and management of operations to meet the requirements of this contract. Include a description of their roles and responsibilities.
b. Identification of all partners, sub-contracts, subcontractor management, criteria for selection, and description of services to be performed. Describe the collaborative relationships with and among subcontractors, as applicable.
c. Provide **Program Management Monthly Status Report**. Report should not exceed 20 pages but shall include both narrative and graphic updates on all activities/projects as specified in the functional requirements.
    i. Program Highlights and Issues (Program Management Office, Engineering, Content, Operations, Training, Quality Assurance)
    ii. Next month's Outlook (Program Management Office, Engineering, Content, Operations, Training, and Quality Assurance.
    iii. Inbound contact volume by channel
    iv. Calls offered, answered and abandon (not including transfers)
    v. Average handle time
    vi. Inquiry volume by program
    vii. Inquiries by geographic area
    viii. Top subtopics

ix. Business process uptime
x. Attrition rate of agents
xi. Definitions of commonly used terms

d. Conduct a Quarterly Program Management Meeting/Review with CDC via teleconference or in-person upon mutual agreement.
e. Meetings shall include Weekly Team Meeting, Bi-Weekly Rubric and Calibration Review, Bi-Weekly Operations Meeting, Bi-Weekly Training Review and Bi-Weekly Quality Review, Bi-weekly Documentation Review and Bi-weekly Content Review.

Key Personnel

The Contractor shall:
Provide key personnel to fulfill the key personnel position requirements of this task order. Key personnel may include subcontractors. Each of the Key Personnel positions below must be filled by a separate contractor employee.

The Contractor shall provide:

a. a single, senior dedicated full-time Program Manager to serve as the focal point for management of services and functional operations required under this task order. Authority shall extend to organization, technical and contractual level to ensure full commitment of resources and responsibility for the resolution of issues related to meeting contract performance requirements.
b. a dedicated full-time trainer
C. a full time Data/reports manager and
d. a dedicated full-time Quality Assurance manager
e. a dedicated full-time Content Management Specialist. (see task 16)
f. an "on call" Genesys Engineer (see Task 21)
g. Notify CDC and GSA in the event of a change in these positions.

Task 25 Transition and Implementation of Task Order

The contractor shall have until May 31, 2018 to complete transition from the previous contact center contract environment to the current requirements. The contractor is expected to assume full operations of the new task order requirements by May 31, 2018.

The contractor shall provide a detailed transition plan immediately upon award that outlines the approach, pricing, and timeline for managing the following transition activities:

i. Parallel operations with existing contact center (parallel operations expected to last for nine months (May 31, 2018).
ii. Methodology/order for transition (topic, volume, skill set)
iii. Site specific transition strategies, including remote agents, if applicable
iv. Data center move and data migration
v. Content management system readiness and content migration
vi. Verizon Genesys ICR and IVR engineering tasks and integration
vii. Telecomm and IT system readiness and connectivity
viii. Agent recruitment and training
ix. Quality assurance and customer satisfaction system stand-up
x. Inquiry handling strategies – phone, email, chat, text and postal mail

  xi. Surge response strategy during transition
  xii. Other key functions necessary to ensure smooth transition

a. Provide projected schedule/timeline with definite start/end dates and critical milestones, necessary resources (project teams/team leaders), and process to notify the Government of impending risks to the schedule with recommended mitigation strategies
b. Provide weekly status reports
c. Meet with CDC in-person or via phone at a time specified by the Government upon task order award. CDC-INFO will require the Contractor to attend a Post Award Conference and it will be conducted as follows:
   - Within ten (10) business days after award of the task order, the Contractor shall meet with the GSA Contracting Officer, the COR(s) and other government technical personnel to thoroughly review the requirements of the task order document, contract administration procedures and invoicing requirements. Contractor representatives attending the Conference shall include a company representative authorized to bind the company, the Program Manager responsible for overall contract administration and all Key Personnel. Should the conference be held in person it will take place at the Roybal Campus, Atlanta, GA, if not the Conference may be conducted by telephone.
   - The COR will work through the contracting officer to set up conference.

Task 26 Contract Phase Out (If needed)
At the end of this awarded task order period, CDC expects a smooth, orderly, and cooperative transition of services. All materials and data (most current versions) created and collected during the course of this contract and owned by the Government will be turned over in a timely manner. At the end of the final task order period and during the transition of services, the existing Contractor(s) shall continue the work of this contract and contact center operations should continue at the same level of service.

The contractor shall:
a. Provide a **Transition Plan** for the transition or phase-in of this project as well as phase -out.
b. The plan shall include technical and management transition approach that is clear and complete including the timeline and resources required for the transition.
c. The plan shall detail the planned transition methodology in logical sequence to ensure a smooth transition of all tasks/subtasks of the PWS without interruption or degradation of service levels.
d. The plan shall include an approach that ensures the successful achievement while limiting impact to existing programs/projects.
e. The plan shall also include a complete description of risks (cost, technical and performance to both the contractor and the Government), issues and risk mitigation strategies.

Task 27 Ownership of Data and Materials

The Contractor shall:
a. Provide CDC at any point during and at the conclusion of the task order access to or

copies of data and materials created, captured or stored required to support the services of this contract.

b. Not release, publish, share or use data or other information collected under this task order with other government agencies, organizations, companies or individuals without express written authorization from the Contracting Officer Representative (COR).

c. Arrange for the timely transfer of all data records to CDC should this task order terminate for any reason. END OF TASKS.

8.0 Implementation of New Programs and Services

All activities associated with the expansion of services to be CDC inclusive (all programs) into a consolidated operation. Activities include scheduling for expansion and enhancements in tight succession and in parallel, operating in tandem with phase in/transition efforts, expanding the technical infrastructure to support additional capacity (surge in calls, agents and inquiries) implementing processes to incrementally build the knowledge base, training, and enhancing functional capabilities to expand services. Examples of new services include expanding regular operations to 24x7 and expanding multilingual capabilities.

- Provide an Implementation Plan within the Transition Plan for initiatives for expansion of services to be CDC inclusive. Base plan on the concept of joint management teams operating concurrently with phase in/transition efforts. Plan should include, at a minimum: recommendations for project teams and identification of team leaders, a projected schedule for expansion and enhancements in tight succession, and identify key events and opportunities to enable parallel implementation phases.

- Develop a detailed Project Plan for each team that specifies outcomes, project schedules with defined start and end dates, critical milestones, specify processes to incrementally build the knowledge base, and determine necessary resources

- Provide enhancement of consumer services applications and functional requirements based upon available technology including web development to expand awareness of new information available through the contact center.

- Provide Monthly Status Reports (see deliverables) for each project.

This OPTIONAL CLIN x003F (Implementation of New Programs and Services) is currently partially funded.

Implementation of New Programs and Services NTE Amounts below:

Base Year -	$11,429.00
OY 1 -	$20,400.00
OY 2 -	$20,808.00
OY 3 -	$21,224.16
OY 4 -	[redacted]
OY 5 -	[redacted]
Six Mth Ext	[redacted]
Total	[redacted]

9.0 Refresher Technology-Optional services

The Contractor shall:

- Provide throughout the life of this task order, provide on-going evaluations and recommendations of innovative and emerging technologies, applications, and services to identify opportunities to improve cost, efficiency, systems performance, and quality of service. This will include software and or equipment enhancements or upgrades. This could also include Cloudburst technology and evolving social media channels.
  Submit recommendations for review and approval by CDC prior to planning and implementation.

  This CLIN x003G (Refresher Technology - Optional services) is currently partially funded.

  Refresher Technology NTE Amounts:

Base Period	$ 5,714.00
Option Year 1	$ 10,200.00
Option Year 2	$ 10,404.00
Option Year 3	$ 10,612.08
Option Year 4	$ [redacted]
Option Year 5	$ [redacted]
Six-Month Extension	$ [redacted]
	$ [redacted]

10.0 Surge and Scalability - Optional services - this line item will be priced separately.

The Contractor shall:

- Provide Surge and Scalability services to support the CDC-INFO Contact Center to perform emergency response coverage during public health events, outbreaks, emergencies, pandemics, etc. in support of CDC's Emergency Operations Center, the Department of Health and Human Services and other federal agencies. During emergency response, the contractor shall have the capability to operate 24 hours, 7 days a week, if requested by the government.

  This CLIN x003B (Surge and Scalability - Optional services) is currently funded.

  Surge and Scalability Support NTE Amounts:

Base Period	$ 742,857.00
Option Year 1	$1,326,000.00
Option Year 2	*
Option Year 3	*
Option Year 4	*
Option Year 5	*

Six-Month Extension	*

***see SF30 for specific amounts**

11.0 Preparation and Start-Up and Transition in of Existing Services -this line item will be priced separately.

- Assume all activities related to contract performance and responsibilities, both technical and functional requirements shall be operational on 05/31/2018. Activities include system design and engineering, implementing a technical infrastructure to support contact center operations, project management, defining the scope to manage the complexity of this endeavor, determination of necessary resources, and establishing project schedules to meet the implementation, operation and management requirements of this contract.
- All activities associated with the transition of existing contact center operations, in accordance with the above tasks, shall be operational on 05/31/2018. Activities include running parallel operations with existing systems, transitioning of existing content repositories, integrating with fulfillment operations, training, and project management to establish schedule and milestone dates.
- The contractor shall complete transition from the previous contact center contract environment to the current requirements within this timeframe. The contractor is expected to assume full operations of the new contract requirements by May 31, 2018.

11.1 Transition Plan - Startup and Phase-out - Optional services - this line item will be priced separately.

The contractor shall provide a Transition Plan for the transition startup /phase-in of the contact center project as well as phase -out.

- The plan shall include the operations of technical and management transition approach that is clear and complete including the timeline and resources required for the transition.
- The plan shall detail the planned transition methodology in logical sequence to ensure a smooth transition of all tasks/subtasks of the PWS without interruption or degradation of service levels.
- The plan shall include an approach that ensures the successful achievement while limiting impact to existing programs/projects.
- The plan shall also include a complete description of risks (content, cost, technical and performance to both the Offeror and the Government), issues and risk mitigation strategies.

11.2 Phase-Out (FAR Clause 52.237-3)

- The contractor shall map out a deliverables schedule as a part of the Transition Plan.
- The contractor shall include their approach to deliver 100% of Archived Recording (audio and video) and 100% of current production recordings (audio files only).
- The contractor shall deliver Training Curriculum materials to CDC on the most

acceptable hardware approved by both parties.

- The contractor shall review and deliver Call Handling materials and remove information applicable only to the contractor and deliver reference materials to CDC on the most acceptable hardware approved by both parties.
- The contractor shall review and deliver Correspondence Reference Materials and remove information applicable only to the contractor and deliver reference materials to CDC on the most acceptable hardware approved by both parties.
- The contractor shall review and transition 100% of the Postal Mail to CDC designated contractor.
- The contractor shall review and transition 100% of the Email Mail to CDC designated contractor.
- The contractor shall retain correspondence agents through the remainder of the transition period to complete "in-process" email responses.

12.0 Deliverables

Note: If a summary is requested it can be provided as an appendix, subject to a page limitation two (2) pages each.

Item #	Description of Deliverable	Deliverables to be included in Quote	Task Order Delivery Date
1	Facility Building Security & Related Control Plan (Task 2 (b))	Provide a summary in the quote.	Final due 60 days after award
2	Surge and Scalability Plan Task 5 (C), Task 8 (b); Task 11.1 (a)	Provide a summary in the quote.	Final due 60 days after award.
2A	Event/Surge State Emergency Report (Task 11.1; Task 23 (b) and Emergency Report Data Definitions see Appendix A)	CDC will provide reporting requirements in solicitation – requirements may change based on system specifications and emergency type.	Daily – during an emergency situation
3	Staffing Management Plan (Task 6)	Provide a summary in the quote	Final due 60 days after award
4	Quality Assurance Plan (Task 7)	Provide a summary in the quote of strategies and methodologies to meet quality objectives.	Final due 60 days of award.
4a	Quality Report	CDC will provide reporting requirements in solicitation	Due by the 10th of each month
5	Training Plan (Appendix D)	Provide a summary in the Quote	Final due 30 days after award
5a	Training Report (Task 9 and Appendix D)	CDC will provide reporting requirements in quote.	Due by the 10th of each month

6	Continuity of Operations Plan (COOP) (Task 20)	Provide summary in the quote.	Final Due Date 60 days after award
7	Data Management Plan (Task 21)	Provide a summary in the quote.	Final Due Date 60 days after award
8	Management Plan (Task 24)	Provide detailed version in quote	Final Due Date 60 days after award
9	Management Monthly Status Report (Task 23 (reporting) and 24)	CDC will provide reporting requirements in solicitation	Due by the 10th day of each month
10	Performance Reporting - Weekly Operation Report (Communication Report)	N/A	By Monday of each week
11	RESERVED		
11a	RESERVED		
11b	RESERVED		
12	Contact Center Raw Data Files – including audio recordings (CDC Dashboard File Transfer Specification - See Appendix C)	CDC will provide reporting requirements in quote.	Daily, by 9:00 am ET on the following \ ay, upon start of task order
13	Start Up/Preparation Plan	Provide detailed version in the PWS.	Plan may be updated/revised with approval of the Government after award
13	Content Migration Plan	Provide detailed version and plan timeline in quote.	Plan may be updated/revised with approval of the Government after award
13	Operations Transition Plan	Provide detailed version including staffing and plan timeline in quote.	Plan may be updated/revised with approval of the Government after award
13	Transition Status Weekly Reports (Transition and Implementation of Contract (Task 25))	Report will be provided weekly.	By Monday of each week
13	Contract Phase Out Plan (Task 26)	Provide plan and timeline in quote.	Final due 180 days after award
14	Inquiry Handling -	Provide a	Final due 45 days

	Escalation Handling (Task 3)	summary in the quote.	after award - CDC will provide written instructions
15	Process and Procedures for Email and Postal Correspondence (In various task sections)	Provide a summary in the quote.	Final due 60 days after award - CDC will provide written instructions
16	Standard Operating Procedures for inquires out of scope and sensitive	Provide a summary in the quote.	Final due 60 days after award - CDC will provide written instructions
17	Network Architecture & Connectivity (Task 10)	Provide a summary in the quote.	Ongoing
18	Content Management System (Task 16)	Provide system capabilities for storing and creating CDC cleared content.	Ongoing
19	Search Utility (Task 13.2)	Provide a summary in the quote.	Ongoing
20	Financial Report	Provide a report that summarizes the funded amount, expenditures and current balance of the task order.	Due by the 10th day of each month
21	Refreshment Technology/Technology Enhancements (Task 18A)	Provide a report that covers any recommended changes or improvements.	1. Due the last business day of the seventh (7) months after the effective date of the task order. 2. If a task order option year is exercised, the contractor shall submit the Future Enhancement Report by the seventh (7) months after the effective date of the exercise of the option. CDC-INFO will respond

			to the recommendations within 30 business days of receipt of the report.

13. 0 SPECIAL INSTRUCTIONS

13.1 Place(s) of Performance: Work shall be performed at Contractor's facility.

13.2 Analysis of Security or Privacy Issues

Depending on the requirements of the task created under this PWS, the contractor may be required to submit privacy clearances, Integrated Baseline Review (IRB) clearances and identify system of record numbers for studies and data systems created or maintained. The contractor must protect the confidentiality of proprietary, sensitive and Personally Identifiable Information (PII).

CDC INFO will handle inquiries from the general public on any number of public health or disease related topics. The Privacy Act may be applicable under SORN 09-20-0136, to cover any PII or protected health information of U.S. citizens that may be voluntarily provided in the performance of the contract scope of work.

Confidentiality of Information: Work on this project may require that personnel have access to Privacy Information. Personnel shall adhere to the Privacy act, Title 5 of the U.S. Code, Section 552a and applicable agency rules and regulations. The user agency will identify and provide direction and guidance for safeguarding all information subject to the Privacy Act. Reports and case files containing individual personal information are confidential. The CDC is not authorized to release individual case reports, and access to individual case data is strictly controlled. The contractor personnel are required to work with case records as well as databases. It is a requirement that the data remain in a controlled access environment. The contractor must protect the confidentiality of sensitive and Personally Identifiable Information (PII).

IT Security Clearance: Contractor performance and resulting deliverables must adhere to all Federal, HHS, and/or CDC IT security policies and procedures. The IT Security Clauses on the following pages (Standard for Security Configurations; Standard for Encryption Language; and Security Requirements for Federal Information Technology Resources) are applicable to the Contractor.

Standard for Security Configurations

(a) The Contractor shall configure its computers that contain HHS data with the applicable Federal Desktop Core Configuration (FDCC) (see **http://nvd.nist.gov/fdcc/index.cfm**) and ensure that its computers have and maintain the latest operating system patch level and anti-virus software level. (Note: FDCC is applicable to all computing systems using Windows XP™ and Windows Vista™, including desktops and laptops—regardless of function—but not including servers.)

(b) The Contractor shall apply approved security configurations to information technology (IT) that is used to process information on behalf of HHS. The following security configuration requirements apply:

(NOTE: The Contracting Officer shall provide applicable security configuration requirements based on information provided by Project Officer, who shall consult with the Operating Division (OPDIV)/STAFFDIV Chief Information Security Officer. The Contractor should refer to the NIST SP 800-70, *National Checklist Program for IT Products – Guidelines for Checklist Users and Developers*, which is accessible from http://csrc.nist.gov/publications/PubsSPs.html, along with the NIST National Checklist Program Repository - https://nvd.nist.gov/ncp/repository. NIST SP 800-70 Rev. 3 is the U.S. government repository of publicly available security checklists (or benchmarks) that provide detailed low level guidance on setting the security configuration of operating systems and applications.)

(c) The Contractor shall ensure IT applications operated on behalf of HHS are fully functional and operate correctly on systems configured in accordance with the above configuration requirements. The Contractor shall use Security Content Automation Protocol (SCAP)-validated tools with FDCC Scanner capability to ensure its products operate correctly with FDCC configurations and do not alter FDCC settings – see http://scap.nist.gov/validation/. The Contractor shall test applicable product versions with all relevant and current updates and patches installed. The Contractor shall ensure that currently supported versions of information technology products meet the latest FDCC major version and subsequent major versions.

(d) The Contractor shall ensure IT applications designed for end users run in the standard user context without requiring elevated administrative privileges.

(e) The Contractor shall ensure hardware and software installation, operation, maintenance, update, and patching will not alter the configuration settings or requirements specified above.

(f) The Contractor shall (1) include Federal Information Processing Standard (FIPS) 201-compliant (see http://csrc.nist.gov/publications/fips/fips201-1/FIPS-201-1-chng1.pdf), Homeland Security Presidential Directive 12 (HSPD-12) card readers with the purchase of servers, desktops, and laptops; and (2) comply with FAR Subpart 4.13, Personal Identity Verification.

(g) The Contractor shall ensure that its subcontractors (at all tiers) which perform work under this contract comply with the requirements contained in this clause.
(End of clause)

Standard for Encryption Language

(a) The Contractor shall use **Federal Information Processing Standard (FIPS) 140-2**-(PDF) compliant encryption (Security Requirements for Cryptographic Module, as amended) to protect all instances of HHS sensitive information during storage and transmission. (Note: The Government has determined that HHS information under this contract is considered "sensitive" in accordance with **FIPS 199, Standards for Security Categorization of Federal Information and Information Systems**, dated February 2004.)

(b) The Contractor shall verify that the selected encryption product has been validated under the Cryptographic Module Validation Program (see **http://csrc.nist.gov/cryptval/**) to confirm compliance with **FIPS 140-2** (as amended). The Contractor shall provide a written copy of the validation documentation to the Contracting Officer and the Contracting Officer's Technical Representative.

(c) The Contractor shall use the Key Management Key (see **FIPS 201**, Chapter 4, as amended) on the HHS personal identification verification (PIV) card; or alternatively, the Contractor shall establish and use a key recovery mechanism to ensure the ability for authorized personnel to decrypt and recover all encrypted information (see **http://csrc.nist.gov/drivers/documents/ombencryption-guidance.pdf**). The Contractor shall notify the Contracting Officer and the Contracting Officer's Technical Representative of personnel authorized to decrypt and recover all encrypted information.

(d) The Contractor shall securely generate and manage encryption keys to prevent unauthorized decryption of information in accordance with **FIPS 140-2** (as amended).

(e) The Contractor shall ensure that this standard is incorporated into the Contractor's property management/control system or establish a separate procedure to account for all laptop computers, desktop computers, and other mobile devices and portable media that store or process sensitive HHS information.

(f) The Contractor shall ensure that its subcontractors (at all tiers) which perform work under this contract comply with the requirements contained in this clause.
(End of clause)

Security Requirements for Federal Information Technology Resources

(a) Applicability. This clause applies whether the entire contract or order (hereafter "contract"), or portion thereof, includes information technology resources or services in which the Contractor has physical or logical (electronic) access to, or operates a Department of Health and Human Services (HHS) system containing, information that directly supports HHS' mission. The term "information technology (IT)", as used in this clause, includes computers, ancillary equipment (including imaging peripherals, input, output, and storage devices necessary for security and surveillance), peripheral equipment designed to be controlled by the central processing unit of a computer, software, firmware and similar procedures, services (including support services) and related resources. This clause does not apply to national security systems as defined in FISMA.

(b) Contractor responsibilities. The Contractor is responsible for the following:

(1) Protecting federal information and federal information systems in order to ensure their—

(i) Integrity, which means guarding against improper information modification or destruction, and includes ensuring information nonrepudiation and authenticity;

(ii) Confidentiality, which means preserving authorized restrictions on access and disclosure, including means for protecting personal privacy and proprietary information; and.

(iii) Availability, which means ensuring timely and reliable access to and use of information.

(2) Providing security of any Contractor systems, and information contained therein,

connected to an HHS network or operated by the Contractor, regardless of location, on behalf of HHS.

(3) Adopting, and implementing, at a minimum, the policies, procedures, controls, and standards of the HHS Information Security Program to ensure the integrity, confidentiality, and availability of federal information and federal information systems for which the Contractor is responsible under this contract or to which it may otherwise have access under this contract. The HHS Information Security Program is outlined in the HHS Information Security Program Policy, which is available on the HHS Office of the Chief Information Officer's (OCIO) website.

(c) Contractor security deliverables. In accordance with the timeframes specified, the Contractor shall prepare and submit the following security documents to the Contracting Officer for review, comment, and acceptance:

(1) IT Security Plan (IT-SP) – due within 30 days after contract award. The IT-SP shall be consistent with and further detail the approach to, IT security contained in the Contractor's bid or quote that resulted in the award of this contract. The IT-SP shall describe the processes and procedures the Contractor will follow to ensure appropriate security of IT resources that are developed, processed, or used under this contract. If the IT-SP only applies to a portion of the contract, the Contractor shall specify those parts of the contract to which the IT-SP applies.

(i) The Contractor's IT-SP shall comply with applicable federal laws that include, but are not limited to, the **Federal Information Security Management Act (FISMA) of 2002** (PDF) (Title III of the E-Government Act of 2002, Public Law 107-347), and the following federal and HHS policies and procedures:

(A) Office of Management and Budget **(OMB) Circular A-130**, Management of Federal Information Resources, Appendix III, Security of Federal Automated Information Resources.

(B) National Institute of Standards and Technology (NIST) **Special Publication (SP) 800-18** (PDF), Guide for Developing Security Plans for Federal Information Systems, in form and content, and with any pertinent contract Statement of Work/Performance Work Statement (SOW/PWS) requirements. The IT-SP shall identify and document appropriate IT security controls consistent with the sensitivity of the information and the requirements of **Federal Information Processing Standard (FIPS) 200**, Recommended Security Controls for Federal Information Systems. The Contractor shall review and update the IT-SP in accordance with **NIST SP 800-26,** Security Self-Assessment Guide for Information Technology Systems and FIPS 200, on an annual basis.

(C) **HHS-OCIO Information Systems Security and Privacy Policy.**

(ii) After resolution of any comments provided by the Government on the draft IT-SP, the Contracting Officer shall accept the IT-SP and incorporate the Contractor's final version into the contract for Contractor implementation and maintenance. On an annual basis, the Contractor shall provide to the Contracting Officer verification that the IT-SP remains valid.

(2) IT Risk Assessment (IT-RA) – due within 30 days after contract award. The IT-RA shall be consistent, in form and content, with **NIST SP 800-30**, Risk Management Guide for

Information Technology Systems, and any additions or augmentations described in the HHS-OCIO Information Systems Security and Privacy Policy. After resolution of any comments provided by the Government on the draft IT-RA, the Contracting Officer shall accept the IT-RA and incorporate the Contractor's final version into the contract for Contractor implementation and maintenance. The Contractor shall update the IT-RA on an annual basis.

(3) **FIPS 199** Standards for Security Categorization of Federal Information and Information Systems Assessment (FIPS 199 Assessment) – due within 30 days after contract award. The FIPS 199 Assessment shall be consistent with the cited NIST standard. After resolution of any comments by the Government on the draft FIPS 199 Assessment, the Contracting Officer shall accept the FIPS 199 Assessment and incorporate the Contractor's final version into the contract.

(4) IT Security Assessment and Authorization (SA&A, formerly "Certification and Accreditation (IT-SC&A))" – due within 3 months after contract award. The Contractor shall submit written proof to the Contracting Officer that an IT-SA&A was performed for applicable information systems – see paragraph (a) of this clause. The Contractor shall perform the IT-SA&A in accordance with the HHS Chief Information Security Officer's Certification and Accreditation Checklist; **NIST SP 800-37**, Guide for Applying the Risk Management Framework to Federal Information Systems: a Security Life Cycle Approach; and **NIST SP 800-53,** Recommended Security Controls for Federal Information Systems. An authorized senior management official shall sign the draft IT-SA&A and provide it to the Contracting Officer for review, comment, and acceptance.

(i) After resolution of any comments provided by the Government on the draft IT-SA&A, the Contracting Officer shall accept the IT-SA&A and incorporate the Contractor's final version into the contract as a compliance requirement.

(ii) The Contractor shall also perform an annual security control assessment and provide to the Contracting Officer verification that the IT-SA&A remains valid. Evidence of a valid system accreditation includes written results of (A) annual testing of the system contingency plan and (B) the performance of security control testing and evaluation.

(d) Personal identity verification. The Contractor shall identify its employees with access to systems operated by the Contractor for HHS or connected to HHS systems and networks. The Contracting Officer's Technical Representative (COTR) shall identify, for those identified employee's, position sensitivity levels that are commensurate with the responsibilities and risks associated with their assigned positions. The Contractor shall comply with the HSPD-12 requirements contained in "HHS-Controlled Facilities and Information Systems Security" requirements specified in the SOW/PWS of this contract.

(e) Contractor and subcontractor employee training. The Contractor shall ensure that its employees, and those of its subcontractors, performing under this contract complete HHS-furnished initial and refresher security and privacy education and awareness training before being granted access to systems operated by the Contractor on behalf of HHS or access to HHS systems and networks. The Contractor shall provide documentation to the COTR evidencing that Contractor employees have completed the required training.

(f) Government access for IT inspection. The Contractor shall afford the Government access to the Contractor’s and subcontractors’ facilities, installations, operations, documentation, databases, and personnel used in performance of this contract to the extent required to carry out a program of IT inspection (to include vulnerability testing), investigation, and audit to safeguard against threats and hazards to the integrity, confidentiality, and availability, of HHS data or to the protection of information systems operated on behalf of HHS.

(g) Subcontracts. The Contractor shall incorporate the substance of this clause in all subcontracts that require protection of federal information and federal information systems as described in paragraph (a) of this clause, including those subcontracts that—

(1) Have physical or electronic access to HHS' computer systems, networks, or IT infrastructure; or

(2) Use information systems to generate, store, process, or exchange data with HHS or on behalf of HHS, regardless of whether the data resides on a HHS or the Contractor's information system.

(h) Contractor employment notice. The Contractor shall immediately notify the Contracting Officer when an employee either begins or terminates employment (or is no longer assigned to the HHS project under this contract), if that employee has, or had, access to HHS information systems or data.

(i) Document information. The Contractor shall contact the Contracting Officer for any documents, information, or forms necessary to comply with the requirements of this clause.

(j) Contractor responsibilities upon physical completion of the contract. The Contractor shall return all HHS information and IT resources provided to the Contractor during contract performance and certify that all HHS information has been purged from Contractor-owned systems used in contract performance.

(k) Failure to comply. Failure on the part of the Contractor or its subcontractors to comply with the terms of this clause shall be grounds for the Contracting Officer to terminate this contract.
(End of clause)

14. RESERVED

15. Records/Data: Please refer to Data Rights clauses contained in the PWS and in the basic USA Contact contract.

16. Section 508 Accessibility Standards

The following Section 508 Accessibility Standard(s) (Technical Standards and Functional Performance Criteria) are applicable (if box is checked) to this acquisition.

a. **Technical Standards**

☒ 1194.21 - Software Applications and Operating Systems

☒ 1194.22 - Web Based Intranet and Internet Information and Applications

☐ 1194.23 - Telecommunications Products

☐ 1194.24 - Video and Multimedia Products

☐ 1194.25 - Self-Contained, Closed Products

☐ 1194.26 - Desktop and Portable Computers

☒ 1194.41 - Information, Documentation and Support

The Technical Standards above facilitate the assurance that the maximum technical standards are provided to the Offeror's. Functional Performance Criteria is the minimally acceptable standards to ensure Section 508 compliance. This block is checked to ensure that the minimally acceptable electronic and information technology (E&IT) products are proposed.

The Industry Partner shall support the Government in its compliance with Section 508 throughout the development and implementation of the work to be performed. Section 508 of the Rehabilitation Act of 1973, as amended (29 USC 794d) requires that when Federal agencies develop, procure, maintain, or use electronic information technology, Federal employees with disabilities have access to and use of information and data that is comparable to the access and use by Federal employees who do not have disabilities, unless an undue burden would be imposed on the agency. Section 508 also requires that individuals with disabilities, who are members of the public seeking information or services from a Federal agency, have access to and use of information and data that is comparable to that provided to the public who are not individuals with disabilities, unless an undue burden would be imposed on the agency.

The Industry Partner should review the following Web sites for additional Section 508 information:

http://www.section508.gov/

http://www.access-board.gov/508.htm

http://www.w3.org/WAI/Resources

17. PAST PERFORMANCE INFORMATION

In accordance with FAR 42.15 Contractor Performance Information, past performance evaluations shall be prepared for each task order that exceeds the simplified acquisition threshold placed against a Government-wide Acquisition Contract. For severable task orders, interim evaluations will be required prior to exercising any option periods. For non-severable task orders, evaluations must be collected, coordinated, and reported upon completion of the task order.

The Government will provide and record Past Performance Information for acquisitions over $150,000 utilizing the Contractor Performance Assessment Reporting System (CPARS). The CPARS process allows contractors to view and comment on the Government's evaluation of the contractor's performance before it is finalized. Once the contractor's past performance evaluation is finalized in CPARS it will be transmitted into the Past Performance Information Retrieval System (PPIRS).

Contractors are required to register in the CPARS, so contractor's may review and comment on past performance reports submitted through the CPARS. The CPARS and PPIRS websites are as follows:

CPARS https://www.cpars.csd.disa.mil/

PPIRS http://www.ppirs.gov

18. Other Direct Costs (ODC's) (if needed). ODC's are categories of charges utilized by the contractor in the performance of the contract service. ODC's are ancillary in nature and integrally related to the contractor's ability to perform the service being acquired, i.e., they must be necessary for the completion of the contract. ODC's must not duplicate cost covered in other areas of the contract.

Any ODCs shall be approved by CDC-INFO and invoiced in accordance with the terms of the task order.

ODC Budget NTE:

Base Period	$ 2,857.00
Option Year 1	$ 5,100.00
Option Year 2	$ 5,202.00
Option Year 3	$ 5,306.00
Option Year 4	$ [redacted]
Option Year 5	$ [redacted]
Six-Month Extension	$ [redacted]
	$ [redacted]

18.1 Travel and expenses. The Contractor shall be required to perform Government approved travel within the Continental United States (CONUS). Prior to travel the Contractor shall coordinate with and receive Government authorization from the COR for all travel, without approval travel is not valid and reimbursement will be denied unless the parties determine otherwise. The Government shall provide the process and templates required for authorization of travel. The Contractor shall be responsible for obtaining all passenger transportation, lodging, and subsistence. Reimbursement of CONUS travel costs shall be in accordance with the Federal Travel Regulations per FAR 31.205-46. The Contractor shall travel using the lowest cost mode transportation commensurate with the mission requirements. When necessary to use air travel, the Contractor shall use the tourist class, economy class, or similar lodging accommodations to the extent they are reasonably available and commensurate with the mission requirements. Travel will be reimbursed on a cost reimbursable basis; no profit or fee will be paid.

Note: ALL travel requests should be issued via GSA ASSB/ITSS Post Award Collaborations link for request and approval. The Joint Travel Regulation (JTR) applies to OCONUS travel.

Travel Budget NTE:

Base Period	$ 2,498.00
Option Year 1	$ 5,100.00
Option Year 2	$ 5,202.00
Option Year 3	$ 5,306.00
Option Year 4	$ [redacted]
Option Year 5	$ [redacted]
Six-Month Extension	$ [redacted]
	$ [redacted]

19. FAR CLAUSES, Supplements & Executive Orders

Contract Clauses in this section are from the FAR as follows:

FAR 52.217-8, Option to Extend Services (Nov 1999)

The Government shall require continued performance of any services within the limits and at the rates specified in the contract. These rates shall be adjusted only as a result of revisions to prevailing labor rates provided by the Secretary of Labor. The option provision shall be exercised more than once, but the total extension of performance hereunder will not exceed 6 months. The Contracting Officer shall exercise the option by written notice to the Contractor within 30 days.

FAR 52.217-9, Option to Extend the Term of the Contract (March 2000)
The Government shall extend the term of this contract by written notice to the Contractor within 30 days; provided that the Government gives the Contractor a preliminary written notice of its intent to extend at least 60 days before the contract expires. The preliminary notice does not commit the Government to an extension.

If the Government exercises this option, the extended contract shall be considered to include this option clause.

The total duration of this contract, including the exercise of any options under this clause, shall not exceed five (5) years and six (6) months.

FAR Clauses incorporated by reference:

52.202-1 – Definitions (Nov 201
52.203-3 – Gratuities (Apr 1984)
52.203-12 - Limitation on Payments to Influence Certain Federal Transactions (Oct 2010)

52.204-4 -- Printed or Copied Double-Sided on Postconsumer Fiber Content Paper (May 2011)
52.204-7 -- System for Award Management (July 2013)
52.204-9 -- Personal Identity Verification of Contractor Personnel (Jan 2011)
52.204-10 – Reporting Executive Compensation and First-Tier Subcontract Awards (Oct 015)52.204-13 – System for Award Management Maintenance (July 2013)
52.209-6 -- Protecting the Government's Interest When Subcontracting with Contractors Debarred, Suspended, or Proposed for Debarment (Oct 2015)
52.227-14 -- Rights in Data – General.
52.227-19 -- Commercial Computer Software License. (Dec 2007)
52.229-4 -- Federal, State, and Local Taxes (State and Local Adjustments) (Feb 2013)
52.232-18 Availability of Funds (Apr 1984)
52.232-22 Limitation of Funds (Apr 1984
52.232-33 -- Payment by Electronic Funds Transfer-- System for Award Management (July 2013)
52.232-39 - Unenforceability of Unauthorized Obligations (Jun 2013)
52.233-1 – Disputes (May 2014)
52.233-3 -- Protest After Award (Aug 1996)
52.233-4 -- Applicable Law for Breach of Contract Claim (Oct 2004)
52.239-1 -- Privacy or Security Safeguards (Aug 1996)

52.242-13 – Bankruptcy (July 1995)
52.246-6 - Inspection - Time and Material and Labor Hour - Alternate I (May 2001)
52.249-2 Termination for Convenience of the Government (Fixed-Price)
(Apr 2012)
52.249-4 -- Termination for Convenience of the Government (Services) (Short Form). (Apr 1984)

52.253-1 -- Computer Generated Forms (Jan 1991)

INCREMENTAL FUNDING - TIME AND MATERIALS/LABOR HOURS

This project may be incrementally funded. If incrementally funded, funds shall be added to the contract/order via a unilateral modification as the funds become available. The contractor shall not perform work resulting in changes to the Government that exceed obligated funds.

The Contractor shall notify the Contracting Officer in writing whenever it has reason to believe that the costs it expects to incur under this contract in the next 60 days, when added to all costs previously incurred, will exceed 75 percent of the total amount so far allotted to the contract/order by the Government. The notice shall state the estimated amount of additional funds required to continue performance of the contract/order for the specified period of performance or completion of the task. Sixty days before the end of the period specified in the Schedule, the Contractor shall notify the Contracting Officer in writing of the estimated amount of additional funds, if any, required to continue timely performance under the contract or for any further period specified in the Schedule or otherwise agreed upon, and when the funds will be required.

The Government is not obligated to reimburse the Contractor for charges in excess of the contract/order funded amount, and the Contractor is not obligated to continue performance or otherwise incur costs that could result in charges to the Government in excess of the obligated amount under the contract/order.

INCREMENTAL FUNDING - FIRM FIXED PRICE

ontract line item(s) [XX] through [XX] is/are incrementally funded. For this/these item(s), the sum of $ [XX] of the total price is presently available for payment and allotted to this contract. An allotment schedule is 6

et forth in paragraph (j) of this clause.

(b) For item(s) identified in paragraph (a) of this clause, the Contractor agrees to perform up to the point at

(c) Notwithstanding the dates specified in the allotment schedule in paragraph (j) of this clause, the Contractor will notify the Contracting Officer in writing at least ninety days prior to the date when, in the Contractor’s best judgment, the work will reach the point at which the total amount payable by the Government, including any cost for termination for convenience, will approximate 85 percent of the total amount then allotted to the contract for performance of the applicable item(s). The notification will state (1) the estimated date when that point will be reached and (2) an estimate of additional funding, if any, needed to continue performance of applicable line items up to the next scheduled date for allotment of funds identified in paragraph (j) of this clause, or to a mutually agreed upon substitute date. The notification will also advise the Contracting Officer of the estimated amount of additional funds that will be required for the timely performance of the item(s) funded pursuant to this clause, for a subsequent period as may be specified in the allotment schedule in paragraph (j) of this clause or otherwise agreed to by the parties. If after such notification additional funds are not allotted by the date identified in the Contractor's notification, or by an agreed substitute date, the Contracting Officer will terminate any item(s) for which additional funds have not been allotted, pursuant to the clause of this contract entitled "Termination for Convenience of the Government."

(d) When additional funds are allotted for continued performance of the contract line item(s) identified in paragraph (a) of this clause, the parties will agree as to the period of contract performance which will be covered by the funds. The provisions of paragraphs (b) through (d) of this clause will apply in like manner to the additional allotted funds and agreed substitute date, and the contract will be modified accordingly.

(e) If, solely by reason of failure of the Government to allot additional funds, by the dates indicated below, in amounts sufficient for timely performance of the contract line item(s) identified in paragraph (a) of this clause, the Contractor incurs additional costs or is delayed in the performance of the work under this contract and if additional funds are allotted, an equitable adjustment will be made in the price or prices (including appropriate target, billing, and ceiling prices where applicable) of the item(s), or in the time of delivery, or both. Failure to agree to any such equitable adjustment hereunder will be a dispute concerning a question of fact within the meaning of the clause entitled "Disputes."

(f) The Government may at any time prior to termination allot additional funds for the performance of the contract line item(s) identified in paragraph (a) of this clause.

(g) The termination provisions of this clause do not limit the rights of the Government under the clause entitled "Default." The provisions of this clause are limited to the work and allotment of funds for the contract line item(s) set forth in paragraph (a) of this clause. This clause no longer applies once the contract is fully funded except with regard to the rights or obligations of the parties concerning equitable adjustments negotiated under paragraphs (d) and (e) of this clause.

(h) Nothing in this clause affects the right of the Government to terminate this contract pursuant to the clause of this contract entitled "Termination for Convenience of the Government."

(i) Nothing in this clause shall be construed as authorization of voluntary services whose acceptance is otherwise prohibited under 31 U.S.C. 1342.

(j) The parties contemplate that the Government will allot funds to this contract in accordance with the following schedule:

On execution of contract $ ________

(month) (day), (year) $ ________

(month) (day), (year) $ ________

(month) (day), (year) $ ________

(End of clause)

20. NON-PERSONAL SERVICES/ INHERENTLY GOVERNMENTAL FUNCTIONS

GSA will not issue orders to provide services prohibited by Subpart 37.1 of the Federal Acquisition Regulations
(FAR). Administration and monitoring of the contractor's performance by GSA or the COR shall not be as detailed
or continual as to constitute supervision of contractor personnel. Government personnel may not perform any supervisory functions for contractor personnel, such as interviewing, appraising individual performance, scheduling leave or work, or directing how to perform work.

GSA meets the needs of its clients for support through non-personal services contracts/task orders. To counter the circumstances that infer personal services and to preserve the non-personal nature of the contract/task order, the Contractor shall adhere to the following guidelines in the performance of the task.

1.	Provide for direct supervision of all contract employees assigned to the task.
2.	Refrain from discussing the issues such as skill levels and hours, salaries, cost and funding data, or administrative and personnel matters affecting contractor employees with the client.
3.	Ensure close communication/coordination with the GSA Project Manager or Contract Administration Specialist, reporting problems to them as they occur (not waiting for a meeting).
4.	Do not permit Government officials to interview potential contractor employees, discuss individual performance, approve leave or work scheduling of contractor employees, terminate contractor employees, assist contractor employees in doing their jobs or obtain assistance from the contractor in doing Government jobs.
5.	Do not assign contractor personnel to work under direct Government supervision.
6.	Maintain a professional distance from Government employees.
7.	Provide contractor employees with badges, if appropriate, identifying them as contractors.
8.	Ensure proper communications with the Government. Technical discussions and Government surveillance are acceptable, but the Government cannot tell the Contractor how to do the job.
9.	Assign a task leader to the contract. The task leader or alternate shall be the only one who accepts tasking from the assigned Government point of contact or alternative.
10.	When travel is required for the performance on a task, contractor personnel are only to travel as directed by their contract management.

The contractor shall not perform any Inherently Governmental Functions as defined in FAR 2.101 and 7.5.

Inherently governmental function" means, as a matter of policy, a function that is so intimately related to the public interest as to mandate performance by Government employees. This definition is a policy determination, not a legal determination. An inherently governmental function includes activities that require either the exercise of discretion in applying Government authority, or the making of value judgments in making decisions for the Government. Governmental functions normally fall into two categories: the act of governing, *i.e.,* the discretionary exercise of Government authority, and monetary transactions and entitlements.

(1) An inherently governmental function involves, among other things, the interpretation and execution of the laws of the United States so as to--

(i) Bind the United States to take or not to take some action by contract, policy, regulation, authorization, order, or otherwise;

(ii) Determine, protect, and advance United States economic, political, territorial, property, or other interests by military or diplomatic action, civil or criminal judicial proceedings, contract management, or otherwise;

(iii) Significantly affect the life, liberty, or property of private persons;

(iv) Commission, appoint, direct, or control officers or employees of the United States; or

(v) Exert ultimate control over the acquisition, use, or disposition of the property, real or personal, tangible or intangible, of the United States, including the collection, control, or disbursement of Federal funds.

(2) Inherently governmental functions do not normally include gathering information for or providing advice, opinions, recommendations, or ideas to Government officials. They also do not include functions that are primarily ministerial and internal in nature, such as building security, mail operations, operation of cafeterias, housekeeping, facilities operations and maintenance, warehouse operations, motor vehicle fleet management operations, or other routine electrical or mechanical services.

21. INVOICE REQUIREMENTS-GSA ELECTRONIC INVOICING

21.1 Payment Information. ***Failure to enter an invoice into the GSA Central Invoice Service (CIS) web-based system may result in a rejection.*** The contractor shall provide the following payment information for GSA use. It must be an exact match with the information under the contract/task order number in the GSA ITSS Contract Registration (not the contractor's company or individual representative's registration) as well as with the information under the contractor's DUNS number in the System for Award Management (SAM) web-based system, http://www.sam.gov. Mismatched information may result in rejected requests for payment.

21.2 Invoice Information:

- Company Name – Legal Business Name and DBA (Doing Business As) Name
- Mailing Address – Contact and Address Information
- Remittance Address – Remit To Address Information
- Employer's Identification Number – Federal Tax ID
- DUNS (Data Universal Numbering System)
- Invoice Number – must not include any special characters; CIS and the invoice must match
- ACT Number from GSA Form 300, Block 4
- GSA Contract Number – must match ITSS
- Contract Number from GSA Form 300, Block 3
- Point of Contact and Phone Number
- Contract Period of Performance and the exact Billing Period
- Charges, identified by deliverable or line item(s), with a narrative description of the service performed
- Prompt Payment Discount, if offered
- Total cumulative contract amount and burn rate

21.3 Invoice Submission Process: Contractors shall submit the official invoice in CIS via the GSA ASSIST PORTAL (https://portal.fas.gsa.gov/web/guest/home) as follows:

LOGIN to ASSIST→SEARCH for your GSA Contract number (Example: ID04160049) →SELECT the 'Invoices and Acceptance Reports' Link;
CREATE New Invoice→COMPLETE the Invoice Form;
ATTACH (mandatory) file copy of invoice and other required supporting documents→SUBMIT the form:

NOTE: Original receipts, travel vouchers, and related documentation that have been completed in accordance with Government Federal Travel Regulations (JTR) shall be maintained by the contractor and made available to Government auditors upon request. Reimbursable costs must not exceed the limit(s) specified in the contract. The Government will not pay charges that are not specifically identified in the contract and approved, in advance, by the Contracting Officer.

- Invoices for final payment must be identified as 'FINAL' and submitted within 60 days from task completion. No further charges are to be billed. The contractor shall request an extension for final invoices that may exceed the 60 days from GSA.

- After invoice submission is completed, the COR will accept goods or services then the GSA Representative will accept the invoice for payment.

For assistance, please contact the AASBS Help Desk at (877) 472-4877 or aasbs.helpdesk@gsa.gov. For CIS training, please review the CIS training modules for Contractors at Central Invoice Service Training for Contractors.

21.4 Reimbursable. Reimbursables must not exceed the limit(s) specified in the contract. The Government will not pay charges that are not specifically identified and approved, in advance, by the Government. Copies of receipts, travel vouchers, etc. that have been completed in accordance with Government JTRs shall be attached to the invoice to support charges other than employee labor hours.

The amount invoiced shall include labor charges for actual hours worked and other direct costs (ODCs) which may be authorized by this contract (e.g., travel). For ODCs, invoiced charges shall not exceed the limit specified in the contract. No charges will be paid by the Government, which are not specifically identified in the task and approved in advance by the Government. Copies of receipts, travel vouchers, etc., completed in accordance with Government Travel Regulations shall be attached to the invoice to support charges other than personnel hours. Original receipts shall be maintained by the contractor and made available to Government auditors upon request**.**

The invoice shall be submitted on official company letterhead with detailed costs for each of the following categories:

- Labor expended for each skill category
- Total labor charges
- Travel and per diem charges (if any)
- Total other direct costs (ODCs) (if any)
- Total invoice amount
- Prompt payment discount offered, if applicable

21.5 Final Invoice and Release of Claims The contractor shall submit a final invoice within 60 calendar days after the end of the Performance Period. Invoices for final payment must be so identified. No further charges are to be billed. The contractor shall request from GSA a 60-day extension for final invoices submission with valid justification.

21.6 Payment Schedule for Fixed Price CLINs. The contractor shall invoice for deliverables in accordance with the payment schedule that was submitted to and approved by the GSA Contracting Officer.
Mod 01 - Change the invoicing of CLIN 0001 (only) as follows:

FROM: 1/12 per month of the total amount

TO: 1/10 per month of the total amount

Mod 01 Invoices for work payable under line item 0005 shall be paid monthly, at 1/12 of the total line item value.

22.0 Definitions & Acronyms

ACRONYM	TITLE
ACD	Automatic Call Distributor
ADA	Americans with Disabilities
ANI	Automatic Number Identification
ATSDR	Agency for Toxic Substances and Disease Registry
CCR	Customer Call Records
CDC	Center for Disease Control and Prevention
COO	Continuity of Operations Plan
CME	Customer Management Environment
CRM	Customer Relationship Management
CSR	Customer Service Representatives
CVS	Comma Separated Values
CTI	Computer Telephony Integration
DDA	Designated Approving Authorities
DCS	Division of Communication Services
DHHS	Department of Health and Human Services
DNIS	Dial Number Information Systems
DTMF	Dual Tone Multi-Frequency
EOC	Emergency Operating Center
FDCC	Federal Desktop Core Configuration
FIPS	Federal Information Processing Standard
FISA	Federal Information Security Management
FTP	File Transfer Protocol
HICR	Hosted Intelligent call routing
HIV/STD	Human Immunodeficiency Virus/Sexually Transmitted Disease
IBR	Integrated Baseline Review
ICR	Intelligent call routing
IRD	Interaction Routing Designer
IT	Information technology
IVR	Interactive voice response
JIC	Joint Information Center
KMS	Knowledge Management System
NARA	National Archives and Records Administration
OMB	Office of Management and Budget
OPDIV	Operating Division
PII	Personally Identifiable Information
PR	Prepared Responses
SA&A	Security Assessment and Authorization
SCAP	Security Content Automation Protocol
SCI	Solution Control Interface
sFTP	Secure File Transfer
QA	Quality Assurance
QM	Quality Management

VUI	Voice User Interface
VZ	Verizon
WFM	WorkForce Management

23. ORGANIZATIONAL CONFLICT OF INTEREST (OCI)

(a) Organizational Conflict of Interest" means that because of other activities or relationships with other persons, a person is unable or potentially unable to render impartial assistance or advice to the Government, or the person's objectivity in performing the contract work is or might be otherwise impaired, or a person has an unfair competitive advantage. "Person" as used herein includes Corporations, Partnerships, Joint Ventures, and other business enterprises. All actual or potential OCI situations shall be handled in accordance with FAR Subpart 9.5. Offeror as used in this solicitation section addressing OCI shall include all Contractors that the company submitting this quote has entered into a contractor teaming agreement or prime subcontractor relationship with in connection with its quote submission for this acquisition.

(b) If the Offeror is currently providing support or anticipates providing support to the Government that presents an actual or potential OCI with the requirements for this acquisition, the Offeror warrants that to the best of its knowledge and belief, and except as otherwise set forth in the contract, the Contractor does not have any organizational conflict of interest(s) as defined in paragraph (a).

(c) It is recognized that the effort to be performed by the contractor under this contract may create a potential organizational conflict of interest on the instant contract or on a future acquisition. In contract to avoid this potential conflict of interest, and at the same time to avoid prejudicing the best interest of the Government, the right of the Contractor to participate in future procurement of equipment and/or services that are the subject of any work under this contract shall be limited as described below in accordance with the requirements of FAR 9.5.

(d) (1) The Contractor agrees that it shall not release, disclose, or use in any way that would permit or result in disclosure to any party outside the Government any proprietary information provided to the Contractor by the Government during or as a result of performance of this contract. Such information includes, but is not limited to, information submitted to the Government on a confidential basis by other persons. Further, the prohibition against release of Government provided information extends to cover such information whether or not in its original form, e.g. where the information has been included in Contractor generated work or where it is discernible from materials incorporating or based upon such information. This prohibition shall not expire after a given period of time.

(2) The contractor agrees that it shall not release, disclose, or use in any way that would permit or result in disclosure to any party outside the Government any information generated or derived during or as a result of performance of this contract. This prohibition shall expire after a period of one year after completion of performance on this contract.

(3) The prohibitions contained in subparagraphs (d)(1) and (d)(2) shall apply with equal force to any affiliate of the Contractor, any subcontractor, consultant, or employee of the Contractor, any joint venture involving the Contractor, any entity into or with which it may merge or affiliate, or any successor or assign of the Contractor. The terms of paragraph (f) of this Special Contract Requirement relating to notification shall apply to any release of information in contravention of this paragraph (d).

(e) The Contractor further agrees that, during the performance of this contract and for a period of one year after completion of performance of this contract, the Contractor, any affiliate of the

Contractor, any subcontractor, officers of the company participating in the contract, any joint venture involving the Contractor, any entity into or with which it may subsequently merge or affiliate, or any other successor or assign of the Contractor, shall not furnish to the United States Government, either as a prime contractor or as a subcontractor, or as a consultant to a prime contractor or subcontractor, any system, component or services which is the subject of the work to be performed under this contract. This exclusion does not apply to any re-competition for those systems, components or services furnished pursuant to this contract. As provide in FAR 9.505-2, if the Government procures the system, component, or services on the basis of work statements growing out of the effort performed under this contract, from a source other than the contractor, subcontractor, affiliate, or assign of either, during the course of performance of this contract or before the one year period following completion of this contract has lapsed, the Contractor may, with the authorization of the cognizant CO, participate in a subsequent procurement for the same system, component, or service. In other words, the Contractor may be authorized to compete for procurement(s) for systems, components or services subsequent to an intervening procurement.

(f) The Contractor agrees that, if after award, it discovers an actual or potential organizational conflict of interest; it shall make immediate and full disclosure in writing to the CO. The notification shall include a description of the actual or potential organizational conflict of interest, a description of the action, which the Contractor has taken or proposes to take to avoid, mitigate, or neutralize the conflict, and any other relevant information that would assist the CO in making a determination on this matter. Notwithstanding this notification, the Government may terminate the contract for the convenience of the Government if determined to be in the best interest of the Government.

(g) Notwithstanding paragraph (f) above, if the Contractor was aware, or should have been aware, of an organizational conflict of interest prior to the award of this contract or becomes, or should become, aware of an organizational conflict of interest after award of this contract and does not make an immediate and full disclosure in writing to the CO, the Government may terminate this contract for default.

(h) If the Contractor takes any action prohibited by this requirement or fails to take action required by this requirement, the Government may terminate this contract for default.

(i) The CO's decision as to the existence or nonexistence of an actual or potential organizational conflict of interest shall be final and is not subject to the clause of this contract entitled "DISPUTES" (FAR 52.233-1).

(j) Nothing in this requirement is intended to prohibit or preclude the Contractor from marketing or selling to the United States Government its product lines in existence on the effective date of this contract; nor, shall this requirement preclude the Contractor from participating in research and development or delivering any design development model or prototype of any such equipment. Additionally, sale of catalog or standard commercial items are exempt from this requirement.

(k) The Contractor shall promptly notify the CO, in writing, if it has been tasked to evaluate or advise the Government concerning its own products or activities or those of a competitor in contract to ensure proper safeguards exist to guarantee objectivity and to protect the Government's interest.

(l) The Contractor shall include this requirement in subcontracts of any tier, which involve access to information, or situations/conditions covered by the preceding paragraphs, substituting “subcontractor” for “contractor” where appropriate.

(m) The rights and remedies described herein shall not be exclusive and are in addition to other rights and remedies provided by law or elsewhere included in this contract.

Compliance with this requirement is a material requirement of this contract.

24. Channel of Communications (Actual Totals)

Channel	Mar 2016	Apr 2016	May 2016	June 2016	July 2016	Aug 2016	Sept 2016	Oct 2016	Nov 2016	Dec 2016	Jan 2017	Feb 2017	Grand Total
Email	4,576	4,041	4,107	3,513	3,424	4,360	3,587	3,553	4,055	2,525	3,394	3,651	44,786
Phone	25,325	22,079	21,150	20,647	18,679	23,193	18,373	17,431	14,805	13,185	13,466	12,744	221,077
Postal	14	10	16	54	42	54	37	74	53	41	77	80	552
TTY	18	25	26	27	17	35	24	42	14	14	36	11	289
	29,933	26,155	25,299	24,241	22,162	27,642	22,021	21,100	18,927	15,765	16,973	16,486	266,704

Appendix A Em*ergency Report Data Definitions - (See Deliverable 2a)*

Emergency Report: Data Field Definitions
The emergency report contains two worksheets: A summary worksheet labeled with the emergency response's name and a data worksheet.

Summary Worksheet - **At a minimum, the summary worksheet should contain the following information.**

- **PR usage:** Lists all PRs relevant to the emergency operation topic and their usage each day.
- **Inquiry count by interaction source and inquirer type**: Shows the number of daily calls, emails, and postal mail, and the number of inquirers who have identified themselves as a clinician, general public, educator, or the media.

Data Worksheet
At a minimum, the data worksheet should contain the following fields.

- **Case ID**: Identification number of each record.
- **Activity Type**: Communication channel by which inquirers submitted their question (i.e., phone, email, or postal mail)
- **Create Date**: Date when the inquirer called sent an email, or when a postal mail was forwarded to the contact center.
- **Audience**: Self-identified information from the inquirer (i.e., clinician, general public, media, or educator).
- **Disposition**: Action taken to resolve the inquiry.
- **AZ List**: Agents select topic most relevant to the question asked from AZ List.
- **PR List**: Prepared responses (PRs) used to answer an inquiry. Agents can record up to five (5) PRs per inquiry. There may be records without a PR number if a log call PR is not required.
- **Inquiry**: Summary of the inquirer's questions.
- **Comments**: Agents' comments to provide additional information about an inquiry (optional).
- Language: Language the inquiry came in as.

Appendix B: Customer Call Records (CCR) Column Definitions
(See Deliverable 11b)

NOTE: All data fields are fixed and comma delimited. Columns containing no data should be null.

Column Letter	Description	Useful	Detail
A	Call Start Time	Y	Time the application answered the call in Eastern time (standard or daylight savings). Format = yymmddhhmmss
B	Platform Call Duration	Y	Length of the call in seconds. Includes time in the ECR system plus time bridged if full-time TNT monitoring is used. Total call duration will be in this field only if full-time TNT monitoring is used for all out dials.
C	Value is always: 0000	N	Value never changes.
D	Value is always: 0000	N	Value never changes.
E	Value is always: 9999	N	Value never changes.
F	Value is always: 0000	N	Value never changes.
G	Originating Line Info	Y	0 = Plain Old Telephone System/POTS (Landline) -1 = Other (Mobile Phones)
H	Value is always: 0000	N	Value never changes.
I	Value is always: 0000	N	Value never changes.
J	Call Completion Code	Y	1 = Complete 2 = Incomplete 3 = No Call Extension, reached CP Complete flag* (example Media calls)

K	Supplemental Call Completion # 1s (applies to last outdial only)	Y	10 = No outdial 12 = Hang-up before answer 14 = Outdial reached answer
L	Supplemental Call Completion # 2	Y	0 = 1st outdial had a normal termination (not busy or no answer) 11 = 1st outdial reached blocked condition 13 = 1st outdial reached no answer
M	Count of Dial out Attempts	Y	Number of dial out attempts*
N	ANI	Y	The caller's phone number.
O	DNIS	Y	The number the caller dialed.
P	Entry Point	N	Not useful because the coded version provides the same information
Q	Entry Point Coded	Y	
R			
S			
T	Travel Path Coded	Y	
U	Survey Start	Y	Marks the beginning of the survey
V	Survey Q1	Y	Q1 - How satisfied are you with the agent who handled your call today?
W	Survey Q2	Y	Q2 - Did you receive the health information you were looking for?
X	Survey Q3	Y	Q3 - Based on the information you received, would you say you are likely to make changes to your lifestyle or your family's lifestyle.
Y	Survey Q4	Y	Q4 - Why did you contact CDC-INFO by phone? –

			Select option.
Z	Survey Q5	Y	Q5 - Are you male or female?
AA	Survey Q6	Y	Q6 - How old are you?
AB	Survey Q7	Y	Q7 - What ethnicity do you identify with?
AC	Survey Q8	Y	Q8 - What race do you identify with most?
AD	Survey Q9	Y	Q9 - Texting
AE	Survey Q10	Y	Q10 - Social media channels like Facebook or Twitter
AF	Survey Q11	Y	Q11 - Email
AG	Survey Q12	Y	Q12 - Live chat
AH	Dialout Sequence Number	Y	The nth dialout placed by ECR during this call.
AI	Out dialed Number	Y	The 800 or DDD or route plan number used
AJ	B (D, F, H, etc.)	N	Value increments after every outdial, but doesn't represent anything.
AK	A (C, E, G, etc.)	N	Value increments after every outdial, but doesn't represent anything.
AL	Outdial Start Time	Y	# of sec after Call Start time that this call segment was initiated

AM	**Dialout Code**	**Y**	**31 = Calling party hung-up first** **32 = Called party busy** **35 = Called party ring-no-answer (timeout)** **36 = Requested Channel Not Available (Ext_Result = 44)** **37 = Giveback or Takeback used** **38 = Calling Party hung up while agent bridging in process** **-1 = Called party hung-up first or used Transfer** **99 = Network call processing error**
AN	**A (B, C, D, etc.)**	**N**	**Value increments after every outdial, but doesn't represent anything.**
AO	**Bridge Time:**	**Y**	**# of seconds after Call Start time that the Audio was bridged through to the caller**
AP	**Value is always: 1**	**N**	**Value never changes.**
AQ	**Bridge Duration:**	**Y**	**Cumulative duration in seconds that this call segment lasted**
AR	**Value is always: (null)**	**N**	**Value never changes.**
AS	**Value is always: 0**	**N**	**Value never changes.**
AT	**Value is always: 1**	**N**	**Value never changes.**
AU	**Received from Prior Busy**	**Y**	**0 = Prior call not Busy or no prior call** **1 = Prior call Busy**
AV	**Received from Prior No Answer**	**Y**	**0 = Prior call answered or no prior call** **1 = Prior call not answered (timeout)**
AW	**Transfer Flag**	**Y**	**0 = Not returned to ECR & no previous transfer** **1 = Call returned to ECR** **2 = Call received from a transfer** **3 = Call received from transfer & returned to ECR**

Appendix C: Dashboard File Transfer Specification
(See Deliverable 12)

Overview

The Center for Disease Control (CDC) is creating a reporting dashboard. This document defines the data extracts to be delivered to the CDC to feed the reporting dashboard.

File Set

Call Records and Cases

The Call Records and Cases file extract contains the detail of all Call Records and all Cases that received any activity (as determined by Last Modified Date) during the previous day defined as 8pm to 8pm Eastern.

Emails

The Emails file extract contains the detail of all outgoing Emails, including auto-generated escalation emails, which were sent to the CDC during the previous day defined as 8pm to 8pm Eastern. This data set will contain ALL email records from the customer relationship management (CRM) system.

Escalated Call Records – Cases Cross-Reference

The Escalated Call Records – Cases Cross-Reference file will provide a cross-reference between any call records generated during the previous day that were escalated and the case record that is generated by the escalation.

Call Records –Recording IDs Cross-Reference

The Call Records – Recording IDs Cross-Reference file will provide a cross-reference between any call record generated during the previous day plus the Recording ID identifying the recording of the call identified by the Call Record ID.

General Specification

The rules described in this section apply to all files in the file set.

File Type Description

Comma delimited text files with column headers.

Character Set (Code Page)

ISO 8859-15 (Latin 1)

Delimiters

Record Delimiter: Carriage Return + Line Feed ([CR] [LF])
Column Delimiter: Comma (,)

Text Qualification

Free-form text fields will be text-qualified to preserve all characters entered by the CRM application user.

These fields are indicated in the file definition sections below in the Text Qualified column.

Text Qualifier: Double Quotes (“)

Naming Convention

File Name is composed of four distinct parts separated by underscore (_) character:

1. Originating entity
   a. Names the entity that produces the file
2. File content type
   a. Describes the data contained in the file
   b. Valid file content type values for the file set:
      i. CALLRECORD_CASE: Call Records and Cases
      ii. EMAIL: Escalation Emails
      iii. ESC_CALL_REC_XREF: Escalated Call Records cross-referenced by id to their Case records.
3. File Date
   a. Date mask: YYYYMMDD
      i. YYYY represents Year
      ii. MM represents Month
      iii. DD represents Day
   b. Date is previous business day
      i. Day is defined as 8pm from previous day to 8pm current day.
      ii. Time zone is Eastern.
4. File Extension
   a. .CSV

Column Position	Column Name	Data Type	Format	Text Qualified	Examples	Description
1	ID	string (<= 20 characters)	Record Type indicator followed by unique integer value. Record Type indicators: Case: CAS Call Record: CR	No	CAS-123456 CR-987654	The CRM record name for the Case or Call Record
2	Record Type	string (= 4 characters)	Call or Case	No	Call Case	Call or Case to indicate the type of record.
3	Origin	string (<= 20 characters)	Email or Phone or White Mail	No	Email Phone	For Cases, the originating channel. Empty for Call Records
4	Disposition	string (<= 100 characters)	alpha-numeric text string	No	Yellow Book Multiple Forms	The final disposition of the Case or Call Record
5	Created Date	US/Eastern Date Time	MM/DD/YYYY HH24:MI:SS	No	12/01/2012 09:31:01	CRM Date Time when the record was inserted
6	Last Modified Date	US/Eastern Date Time	MM/DD/YYYY HH24:MI:SS	No	12/01/2012 09:31:01	CRM Date Time when the record was last updated or inserted
7	Opened Date	US/Eastern Date Time	MM/DD/YYYY HH24:MI:SS	No	05/29/2013 15:01:59	For Cases, the Date Time when the Case was opened Empty for Call Records

8	Closed Date	US/Eastern Date Time	MM/DD/YYYY HH24:MI:SS	No	12/01/2012 09:31:01	For Cases, the Date Time when the Case was closed Empty for Call Records
9	Inquirer Type	string (1 character)	Y or N	No	Y N	Y or N for "Yes" or "No" to indicate if the caller or email originator is a Health Care Provider
10	Inquiry Description	Text stream up to 32000 characters	alpha-numeric text string	Yes	"The caller asked about smallpox vaccinations"	The Description of the case or call record
11	Subject	string (<= 255 characters)	alpha-numeric text string	Yes	"(#95482418) Gmail Forwarding Confirmation - Receive Mail from teletechvcdctest2@gmail.com"	For Cases, the subject of the case
12	Area Code	string (= 3 characters)	3 digit integer	No	985	For Call Records, the area code of the incoming call
13	Comments	string (<= 255 characters)	alpha-numeric text string	Yes	"The caller asked about smallpox vaccinations"	Free form comments entered by the agent working the case or call record
14	Responder Type	string (<= 30 characters)	alpha-numeric text string	No	Tier 1 Agent	The responder type classification of the agent working the case or call record
15	PR List	string (<=	pipe (|)	No	123|88|5011	Pipe

		35 characters)	delimited integer values			delimited list of all PR's (First through Fifth) delivered for the case or call record
16	Priority	string (<= 30 characters)	alpha-numeric text string	No	Medium	For Cases, the priority of the case
17	Topic	string (<= 100 characters)	alpha-numeric text string	No	HIVTesting Other	The Topic of the case or call record
18	Topic Other	string (<= 100 characters)	alpha-numeric text string	Yes	“Avian Flu Testing”	User defined topic for the case or call record when “Other” is chosen as the Topic
19	Status	string (<= 30 characters)	alpha-numeric text string	No	Closed Escalated In Progress	Most recent status of the case or call record.
20	Was Escalated	string (<= 5 characters)	True or False	No	True False	True or False to indicate if the case or call record was escalated

Call Records and Cases File Definition
File mask: ENTITY_CALLRECORD_CASE_YYYYMMDD.CSV
Row Qualifier: For this file only, each row will be wrapped in a prefix and suffix set of characters. This is necessary due to several columns contain free form text with row delimiters present. This row qualification prevents an offset of columns when consumed by end user.
Prefix: #+-a#
Suffix: #-+z#

Emails File Definition
File mask: ENTITY_EMAIL_YYYYMMDD.CSV

Column Position	Column Name	Data Type	Format	Text Qualifie	Example	Description

				d		
1	Case ID	string (<= 20 characters)	Record Type indicator (CAS) followed by unique integer value.	No	CAS-123456	The CRM record name for the case record that is the parent of the Email record
2	Message Date	US/Eastern DateTime	MM/DD/YYYY HH24:MI:SS	No	05/29/2013 15:01:59	CRM time when the message was created
3	From Address	string (<= 255 characters)	email address	No	anybody@anywhere.com	Email address from which the email originated
4	Cc Address	String (<= 255 characters)	Email address list delimited by semi-colon (;)	No	robertspears@teletech.com; anybody@anywhere.com	Email address listing from the 12Cc Address field to which the email was delivered
5	Bcc Address	String (<= 255 characters)	Email address list delimited by semi-colon (;)	No	robertspears@teletech.com; anybody@anywhere.com	Email address listing from the BccAddress field to which the email was delivered
6	To Address	string (<= 255 characters)	email address list delimited by semi-colon (;)	No	robertspears@teletech.com; anybody@anywhere.com	Email address listing from the ToAddress to which the email was delivered

Escalated Call Record – Case Cross Reference File Definition
File mask: ENTITY_ESC_CALL_REC_XREF_YYYYMMDD.CSV

Column Position	Column Name	Data Type	Format	Text Qualified	Examples	Description

1	Call Record ID	string (<= 20 characters)	Record Type indicator (CR) followed by unique integer value.	No	CR-987654	The CRM record name for the Call Record
2	Case Record ID	string (<= 20 characters)	Record Type indicator (CAS) followed by unique integer value.	No	CAS-123456	The CRM record name for the Case.
3	Last Modified Date	US/Eastern DateTime	MM/DD/YYYY HH24:MI:SS	No	12/01/2012 09:31:25	CRM Date Time when the call record was last updated or inserted.
4	Escalation Date	US/Eastern DateTime	MM/DD/YYYY HH24:MI:SS	No	12/01/2012 09:33:21	Create Date for the Case record.

Recording - Call Record Cross Reference File Definition
File mask: ENTITY_RECORDINGID_REF_YYYYMMDD.CSV

Column Position	Column Name	Data Type	Format	Text Qualified	Examples	Description
1	Call Record ID	string (<= 20 characters)	Record Type indicator (CR) followed by unique integer value.	No	CR-987654	The CRM record name for the Call Record
2	Recording ID	string (<= 20 characters)	integer value.	No	5791342 -1 0 {Blank}	The unique identifier for the recording of the call identified by the Call Record. (-1 indicates that the user account used to access the recording data through the web service cannot authenticate, or is an invalid user id. 0 indicates that there was an error in the web service when attempting to obtain the recording id.)

Appendix D Training Report Requirements - SAMPLE
(See Deliverable 5a)

Training Report Requirements - SAMPLE
A listing of all Contact Center Agents that includes what classes they have and have not completed and their completion dates. Dates should be formatted as dates so MS Excel can sort fields. For example:

Agent First Name	Agent Last Name	Class Name #1	Class Name #2
Jane	Doe	1/10/2017	1/17/2017
John	Smith	Incomplete	1/17/2017

A listing of all training sessions, including information on priority, date, duration, topic, delivery, documents required, and percentage of agents completing:

Training	Priority Level	Date	Duration (Hours)	Delivery Type	% Complete	Documents Required
High-Quality	2	1/3/1	1.00	Instructo	20.83%	Quality Calls.ppt

Call Listening		7		r-Led		
Documentation Grammar and Word Choice	1	1/9/17	0.25	Online/Self-Study	10.42%	www.grammar.com/?classid=24
Flu season topics and PRs	3	2/6/17	0.25	Client-Led (On site)	95.8%	Flu_facts_Learner_Guide.docx Flu_facts_Instructor_Guide.docx
How to Get a 100% Quality Score-Client Training	1	2/3/17	0.60	Client-Led (Via Skype)	76%	Skype recording ID - 823659183465

A listing of all documents used in training, with document name, related class, revision date, and comments:

Document Name	Class	Last Revised Date	Comments
2016_11_04_CDCINFO_HIV AIDS Learner Guide_Final	New Hire HIV Training	11/4/2016	Received from CDC on 11/15/16.
2016_11_04_CDCINFO_HIV AIDS Facilitator Guide_Final	New Hire HIV Training	11/4/2016	Received from CDC on 11/15/16.
2017_1_04_CDCINFO_Specialist_NCIRD Assessment	Specialist NCIRD Class	1/4/2017	No longer used.
2016_12_20_CDCINFO_PROverview Learner	New Hire Overview	12/20/2016	Used with video “PR_Overview.MP4”